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LEADING
NATIONAL
ADVERTISERS

Top 100 take it on the chin, feel biggest drop in 4 decades

Sales promotion, direct marketing hold their own; bright spots include Saturn, drugs, as low-pricing efforts exert strong grip

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By R. Craig Endicott

Procter & Gamble Co. for the second consecutive year edged Philip Morris Cos. as the nation's largest advertiser, in a year highlighted by the way the Top 100 Leading National Advertisers cut back on ad spending.

Despite a 5.6% drop in total ad spending to $2.15 billion in 1991, P&G expanded its lead to $104 million as Philip Morris finished the year with $2.05 billion, down 7.8%. The spread in 1990 was only $50 million.

The Top 100 seemed to take their ad spending cues from the two megamarketers. In falling to $33.7 billion, a 3.9% drop, this Top 100 total marks only the second year-to-year decline in the 37 years *Advertising Age* has tracked Leading National Advertiser spending.

Entry to the elite group declined to $100.8 million from $114.6 million in 1990—both tallies recorded by Monsanto Co.

The Persian Gulf War and the recession pushed down spending in the nation's media, accounting for 55.3% of the ad total. Media spending fell to $18.6 billion, down 5.5%, according to LNA/Arbitron Multi-Media Service. Expenditures fell in each of the top four media—by 22% in newspapers, 8.5% in network TV, 3.1% in magazines and 2.2% in spot TV.

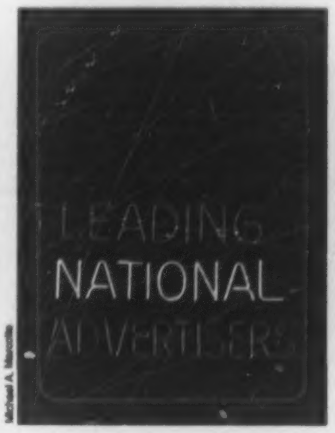
The struggling economy had less impact on unmeasured forms of advertising, such as sales promotion and direct marketing. These ad vehicles are considered particularly effective when consumers become more price-conscious and forsake premium-price brands for less expensive products. This portion of Top 100 ad spending dipped only 1.8% to $15 billion.

Pricing was a dominant theme in both media advertising and promotional efforts in 1991, whether in the form of airline and hotel super-saver fares, everyday low pricing by retailers or no-haggling base sticker prices on several auto makes.

The '91 scorecard shows that many marketers, particularly in the food business, raided media budgets to prime the promotion pump and generate sales. The strategy, considered short-sighted by those who contend only media impressions build brand loyalty and long-term growth, may have worked in the food business, but collectively it fared poorly. U.S. sales for the Top 100 grew only 2.5% for the year.

Like a storm gathering strength, pricing has penetrated marketing plans even more this year, although promotional spending may be

(Continued on Page 72)



Michael A. Marcotte

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100 Leading National Advertisers

Rank			Ad spending
'91	'90	Advertisers	in 1991
1	1	Procter & Gamble Co.	$2,149.0
2	2	Philip Morris Cos.	2,045.6
3	4	General Motors Corp.	1,442.1
4	3	Sears, Roebuck & Co.	1,179.4
5	6	PepsiCo	903.4
6	5	Grand Metropolitan	744.7
7	15	Johnson & Johnson	733.0
8	8	McDonald's Corp.	694.8
9	14	Ford Motor Co.	676.6
10	13	Eastman Kodak Co.	661.4
11	12	Warner-Lambert Co.	656.5
12	16	Toyota Motor Corp.	632.2
13	7	AT&T Co.	617.3
14	10	Nestle SA	600.5
15	18	Unilever NV	593.7
16	9	Time Warner	587.5
17	17	Kellogg Co.	577.7
18	11	RJR Nabisco	571.0
19	20	General Mills	555.6
20	21	Chrysler Corp.	531.1
21	19	Kmart Corp.	527.2
22	22	Anheuser-Busch Cos.	508.4
23	23	Walt Disney Co.	489.1
24	25	American Home Products Corp.	447.1
25	26	Sony Corp.	438.6
26	36	H.J. Heinz Co.	403.1
27	31	Ralston Purina Co.	393.5
28	29	Coca-Cola Co.	367.4
29	28	J.C. Penney Co.	362.6
30	24	Bristol-Myers Squibb Co.	352.5
31	34	Honda Motor Co.	333.1
32	38	Hershey Foods Corp.	298.9
33	32	Matsushita Electric Industrial Co.	292.3
34	41	R.H. Macy & Co.	289.4
35	30	May Department Stores Co.	$277.3
36	35	Sara Lee Corp.	273.0
37	27	Nissan Motor Co.	268.9
38	40	Mars Inc.	253.9
39	37	U.S. Government	253.0
40	45	ConAgra	249.7
41	42	Quaker Oats Co.	237.7
42	39	Colgate-Palmolive Co.	227.5
43	33	Dayton Hudson Corp.	226.5
44	49	American Express Co.	226.4
45	57	Nike Inc.	223.3
46	43	Federated Department Stores	222.8
47	48	American Brands	217.5
48	44	Mazda Motor Corp.	215.0
49	70	Circuit City Stores	213.7
50	47	Tandy Corp.	213.3
51	55	SmithKline Beecham	208.3
52	54	Adolph Coors Co.	206.9
53	51	American Stores Co.	201.6
54	53	Hasbro Inc.	201.4
55	46	General Electric Co.	198.8
56	52	Schering-Plough Corp.	198.4
57	71	Wal-Mart Stores	189.8
58	62	Clorox Co.	182.6
59	68	Gillette Co.	182.5
60	65	Paramount Communications	179.4
61	63	S.C. Johnson & Son	174.0
62	60	U.S. dairy farmers	167.9
63	89	Delta Air Lines	164.5
64	61	Campbell Soup Co.	164.1
65	73	Helene Curtis Industries	157.4
66	67	Carter Hawley Hale Stores	151.9
67	76	AMR Corp.	150.1
68	64	ITT Corp.	141.5
69	78	Marriott Corp.	$139.7
70	130	MCI Communications Corp.	139.5
71	84	Thompson Medical/Slim-Fast Food Cos.	137.5
72	88	News Corp.	135.8
73	59	Philips NV	133.1
74	102	Dr Pepper/Seven-Up Cos.	131.4
75	80	CPC International	131.4
76	69	Sprint Corp.	131.4
77	58	Goodyear Tire & Rubber Co.	130.7
78	66	Levi Strauss & Co.	129.4
79	56	Loews Corp.	129.0
80	74	Revlon Group	128.0
81	83	Bell Atlantic Corp.	127.5
82	75	Dow Chemical Co.	127.1
83	50	Montgomery Ward & Co.	126.7
84	133	Reebok International	126.5
85	82	Seagram Co.	126.3
86	87	Wm. Wrigley Jr. Co.	125.4
87	95	Wendy's International	124.1
88	91	Daimler-Benz AG	122.2
89	72	Hallmark Cards	121.8
90	77	Mobil Corp.	120.0
91	81	Hyundai Group	119.5
92	97	Upjohn Co.	119.3
93	92	UAL Corp.	119.2
94	96	Canon Inc.	117.6
95	103	Ciba-Geigy	115.4
96	94	U.S. Shoe Corp.	113.3
97	129	B.A.T Industries	113.0
98	104	Kimberly-Clark Corp.	107.7
99	156	American Cyanamid Co.	105.2
100	99	Monsanto Co.	100.8

Notes: Dollars are in millions. AA chart: Kevin Brown

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For many, a year of hard lessons

RANK: 47

American Brands

Old Greenwich, Conn.
Ad spending: $217.5 million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	64,319	60,921	5.6
Sunday magazine	11,799	19,464	-39.4
Newspaper	650	680	-4.4
Outdoor	12,294	11,103	10.7
Network TV	7,147	7,123	0.3
Spot TV	55	173	-68.0
Cable TV networks	182	201	-9.4
Network radio	169	1,353	-87.5
Measured media	96,624	101,028	-4.4
Unmeasured	120,900	126,400	-4.4
Total	217,524	227,428	-4.4
By top brands	**1991**	**1990**	**% chg**
Carlton cigarettes	20,123	25,138	-20.0
Misty Slims cigarettes	14,303	4,790	199.3
Bull Durham cigarette	12,156	31	NA
Acushnet golf equipment	9,864	7,820	26.1
Montclair cigarettes	8,387	12,296	-31.8
Jim Beam	7,179	6,223	15.4

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	14,064	13,781	2.1
Earnings	806	588	37.0
U.S.	**1991**	**1990**	**% chg**
Sales	5,077	4,686	8.3
Operating income	996	906	10.0
Division sales	**1991**	**1990**	**% chg**
Tobacco	8,153	8,037	1.4
Life insurance	870	806	8.1
Distilled spirits	1,061	1,005	5.6
Office prods	982	1,025	-4.1
Hardware	902	633	42.6
Specialty businesses	2,096	2,276	-7.9

CORPORATE PROFILE

American Brands' two leading advertised categories—cigarettes and liquor—each grew in declining industries in 1991.

American Tobacco Co. advanced 0.7% in volume to a 7% share, led by its strong value-price segment, the growth area in the total market. The share improvement of 0.2 point put the company within striking distance of No. 3 Lorillard, which declined 0.3 point to 7.3%.

American Tobacco can trace its share-point gain to relative newcomer Montclair, a value-price brand that grew 0.6 point to 1.3% of the market on volume of 6.54 billion units, up 84.7% in its second year, according to John C. Maxwell Jr., an analyst at Wheat, First Securities. Media spending behind the brand dropped to $8.4 million, off 31.8% from its inaugural burst, according to LNA/Arbitron Multi-Media Service.

Other value-price brands aiding growth were Misty Slims and Bull Durham. Misty Slims got $14.3 million in media spending, up from $4.8 million in 1990, its first year. Bull Durham claimed $12.1 million in media advertising in its first year.

Several full-price brands slipped, reflecting the overall national trend. Pall Mall declined 18.7% in volume and dropped in market share to 1.9%, the company's highest individual share. Carlton fell 7.4% in volume to end with a 1.5% share.

The industry's value-price segment increased to 25% of the total market in 1991, according to Mr. Maxwell. American Tobacco typified the swing to the price-conscious sector: Its full-price brands lost 14.2% in volume as its value-price brands grew 40.4% in volume.

Of American Brands' $96.6 million in total media in 1991, American Tobacco claimed 60%, down from 66% in the prior year, and the liquor segment accounted for 20%, up from 19%, noted LNA.

American Brands' Jim Beam Brands Co. proved one of the stronger performers in a liquor industry slapped with a higher federal excise tax. That and the recession led to a 4% to 4.5% decline in industry volume, Mr. Maxwell said.

Jim Beam Brands pushed Heublein out of the top spot with a 12.1% share of market, up from 9.4% in 1990 on volume growth of 28.7%. Heublein finished at 10.4%, down from 12.8%. The surge was heavily influenced by Beam's acquisition of seven brands from Seagram. The brands bought include Lord Calvert Canadian and Calvert Extra whiskies, Calvert gin, Wolfschmidt vodka, Ronrico rum and Leroux cordials.

Jim Beam bourbon, the nation's top-selling bourbon and No. 6 overall, maintained its 2.3% market share in the total liquor market despite a 4% decline in case depletions. Such volume backsliding in a declining market turned into 1-point share growth.

The company spent $20.5 million in media on its distilled spirits, up 9%, giving Jim Beam bourbon the most support of $7.2 million, up 15.4%.

HEADQUARTERS

American Brands/1700 E. Putnam Ave./P.O. Box 819/Old Greenwich, Conn. 06870-0811/Phone:(203) 698-5000

PERSONNEL, BRANDS, AGENCIES

AMERICAN TOBACCO CO.: Management Center/6 Stamford Forum/P.O. Box 10380/Stamford, Conn. 06904-2380/Phone: (203) 325-4900.

E.J. Gesell-vp mktg-sales; R.E. Smith, vp-brand mgr/mktg svcs; J.M. Ockers, vp-strategic planning-new prod; K.P. Noone, media/consumer promo dir; W. Degenhardt, media dir asst; J.E. Vyse, mktg budget/planning dir; D.A. Wogerbauer, dir-mktg rsch; E.M. Ashkin, sr mktg rsch mgr; C.D. Willoughby, mktg rsch mgr; T.M. Keane, sr prod mgr; J.C. Bogie, C.J. Brown, M.J. Burns, prod mgrs; T.A. Albert, vp-sales.

American, Bull Durham, Carlton, Lucky Strike, Malibu, Misty, Montclair, Pall Mall, Riviera, Tareyton: LCF&L, New York; C. Goldschmidt, chmn-promo/direct mktg.

Clarion Marketing & Communications, Greenwich, Conn.; H. Goldfrach, sr vp; P. Ifland, vp-mgmt super.

FRANKLIN LIFE INSURANCE CO.: Franklin Square/Springfield, Ill. 62713-0001/Phone: (217) 528-2011. Tom Byerly, sr vp-mktg; David Vanselow, vp-comms.

Squires Advertising Agency & Art Studio, Springfield, Ill.; Stan Squires, vp.

JIM BEAM BRANDS CO.: 510 Lake Cook Road, Suite 200/Deerfield, Ill. 60015/(708) 948-8888.

J. Edgar Moser, vp-mktg/adv.; Michael L. Lintner, sr grp prod dir-golden spirits; Christine Bowdring, grp prod dir-platinum spirits; Alice Kelley, grp prod dir-imports and specialties; Tom Maas, grp prod dir-Maritime brands; Nancy Albert Lintner, vp-corp comm; Gayle Seinfeld, media mgr.

Jim Beam bourbon, Gilbey's gin, DeKuyper cordials, Windsor Canadian whisky, Pusser's rum, Old Grand-Dad bourbon, Kamora coffee liqueur, Kessler blended whiskey, Wolfschmidt vodka, Ronrico rum, The Dalmore Single Malt scotch, Molinari sambuca: Fallon McElligott, Minneapolis; Joseph Culligan, mgmt super.

ACUSHNET CO.: 700 Belleville Ave./New Bedford, Mass. 02745/Phone: (508) 979-2000. Titleist and Foot-Joy Worldwide: David E. Overmyer, vp mktg; Gerald M. Bellis, dir-prod mgmt, golf balls; James Connor, vp-footwear; John B. Hoeflich, dir-prod mgmt, golf clubs; Kenneth J. Kotowki, sr prod mgr-golf gloves; Mary Lou Bohn, sr comms mgr Rubber Div; James G. DeMello, sr vp-gm.

Titleist, Foot-Joy: Lawner Reingold Britton & Partners, Boston; Fred Crinit, acct rep.

ACCO USA: 770 S. Acco Plaza/Wheeling, Ill. 60090-6070/Phone: (708) 541-9500. Loren J. Hulber, exec vp-sales/mktg; William S. Carvell, vp-gm retail div; Gregory A. Carlson, vp-mktg; David L. Smith, vp-sales; Alan Green, vp-mkt devel; Kevin Castle, mktg dir-document mgmt prods; Steven Frei, mktg dir-workstation access; Jeannette Marsland, mktg dir-document mgmt prods; Kenneth Oberg, mktg dir-workstation access; Donald L. Peterson, vp-retail sales; H. David Parkhill, merch dir-retail div; Sharon Lange, dir-advt/mktg svcs.

ACCO and Swingline workstation accessories, document handling and accessories, fastening products, computer accessories, general office products, staplers. E.H. Brown, Chicago; John Derbick, acct exec.

WILSON JONES CO.: 770 S. Acco Plaza/Wheeling, Ill. 60090-6070/Phone: (708) 541-9500. Gregory A. Carlson, dir-mktg; Paul Barrett, natl acct mgr; Jeannette Marsland, prod devel mgr; Richard Lange, info systems mgr; Marvin A. Rosenfeldt, adv mgr.

Wilson Jones office products: Marketing Support, Chicago; Jane Storey, exec vp.

VOGEL PETERSON FURNITURE CO.: 7373 Hunt Ave./Garden Grove, Calif. 92641/Phone: (714) 895-7373. John Costa, pres/dir-mktg; Joellen Englehardt, prod mgr; Jim Roseen, prod mgr.

Office furniture: In house.

PYRMA PRODUCTS CO.: 1346 N. Main St./Duncanville, Texas 75166/P.O. Box 382060/Duncanville, Texas 75138/Phone: (214) 298-4225. James M. Jobin, mktg mgr; Melinda Denny, adv coord.

KENSINGTON MICROWARE LTD.: 2855 Campus Drive/San Mateo, Calif. 94403/Phone: (415) 572-2700. Scott Johnson, natl sales mgr; Carol Fitzgerald, dir-mktg prog; Mary Shank, mktg svcs mgr.

DAY-TIMERS: One Willow Lane/P.O. Box 67/East Texas, Pa. 18046/Phone: (215) 398-1151. Mark LaDouceur, vp-mktg; Natalie Rzonco, mgr-adv.

Time management products: Della Femina, McNamee, Chicago; Tom Lewy, vp-acct super.

MASTER BRANDS INDUSTRIES: 510 Lake Cook Road, Suite 150/Deerfield Ill. 60015-4916/Phone: (708) 831-0808.

MASTER LOCK CO.: 2600 N. 32nd St./Milwaukee, Wis. 53210/Phone: (414) 444-2800. Bo Weis, dir-mktg, door hardware; Steve Williams, dir-mktg, padlock.

Master door locks and padlocks: Cramer-Krasselt, Milwaukee; William Faude, vp.

ARISTOKRAFT: One Aristokraft Square/P.O. Box 420/Jasper, Ind. 47546/Phone: (812) 482-2527. Gary Lautzenhiser, sr vp-mktg/sales.

Aristokraft kitchen cabinets & bath vanities: Creative House, Farmington, Mich.; Dick Ragowski, acct exec.

MOEN INC.: 377 Woodland Ave./P.O. Box 4007/Elyria, Ohio/44036/Phone: (216) 323-3341. H. Gardner, vp-mktg; R. Moorman, dir-mktg svcs.

Moen and Chicago Specialty plumbing products: Cramer-Krasselt, Chicago; Dave Hamel, vp-mgmt super.

WATERLOO INDUSTRIES: 999 Home Plaza/ Waterloo, Iowa 50701/P.O. Box 2095/Waterloo, Iowa/50704/Phone: (319) 235-7131. Mike Strickland, dir-mktg sales; R.C. Wojan, dir-intl sales; Marc Ventor, dir-Sears sales; John From, dir-mktg/sales/healthcare.

Waterloo tool storage products: Hellman Associates, Waterloo, Iowa; Robert B. Hellman, pres.

Waterloo Healthcare: Terry L. Butz Creative, Waterloo, Iowa; Terry L. Butz, pres.

RANK: 99

American Cyanamid Co.

Wayne, N.J.
Ad spending: $105.2 million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	5,206	4,004	30.0
Sunday magazine	691	633	9.1
Newspaper	6	36	-82.7
Outdoor	14	62	-77.4
Network TV	32,109	16,181	98.6
Spot TV	3,153	3,737	-15.6
Syndicated TV	4,486	2,101	113.5
Cable TV networks	1,200	1,184	1.4
Spot radio	5,305	4,287	23.8
Measured media	52,591	32,225	63.2
Unmeasured	52,600	32,200	63.4
Total	105,191	64,425	63.3
By top brands	**1991**	**1990**	**% chg**
Dynatrim diet drink mix	24,760	5,680	337.6
Centrum vitamins	12,968	15,789	-17.9
FiberCon laxative	8,073	4,406	83.1

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	4,986	4,570	9.1
Earnings	359	353	1.7
U.S.	**1991**	**1990**	**% chg**
Sales	3,057	2,762	10.7
Operating earnings	299	29	928.5
Division sales	**1991**	**1990**	**% chg**
Medical	2,642	2,316	14.1
Agricultural	1,206	1,109	8.8
Chemical	1,138	1,146	-0.7

CORPORATE PROFILE

One brand summarizes American Cyanamid Co.'s 63.2% jump in media spending in 1991: Dynatrim. And next year, Dynatrim is likely to share top media ad billings with ProStep, the company's new venture in the hot smoking-cessation market.

Dynatrim diet meal replacement got $24.8 million in support last year compared with only $5.7 million in 1990, with most of the new outlays going into network TV, according to LNA/Arbitron Multi-Media Service.

Such support hasn't helped the Lederle Laboratories brand secure much of the $275.4 million market, according to Towne-Oller & Associates, which credits Dynatrim with a 4.4% share and Slim-Fast Foods with a commanding 88.4% share.

Ad spending next year should jump significantly again as marketing heats up for ProStep, the nicotine skin patch sold by prescription. Introduced in February, ProStep had claimed 13% of market by July, according to analyst Michael Walsh, a VP at Robertson, Stephens.

ProStep ranks third behind Ciba-Geigy Corp.'s Habitrol and Marion Merrell Dow's Nicoderm.

American Cyanamid put most of its other media support behind FiberCon laxative and Centrum vitamin and mineral supplement, according to LNA. Spending for FiberCon jumped 84.1% to $8.1 million, with spending largely going into network and syndicated TV. Centrum media spending dropped 17.9% to $9.13 million.

HEADQUARTERS

American Cyanamid Co./1 Cyanamid Plaza/Wayne, N.J. 07470./Phone: (201) 831-2000.

PERSONNEL, BRANDS, AGENCIES

AGRICULTURAL DIVISION: One Cyanamid Plaza/Wayne, N.J. 07470/Phone: (201) 831-2000. Thomas J. Reser, adv mgr-pesticides. Lewis Knickerbocker, mgr-mktg resources.

Poultry feed, additives, feed phosphate, calcium & urea prods: Bergelt Litchfield, New York. Ed Bergelt, acct super.

Scepter herbicide: Miller Meester Advertising, Minneapolis. Laurie Fleck, acct exec.

Assert wild oat herbicide: Tucker Wayne/Luckie & Co., Atlanta. Mark Kirkpatrick, acct exec.

LEDERLE LABORATORIES: One Cyanamid Plaza/Wayne, N.J. 07470/Phone: (201) 831-2000. Michael Marquard, vp-gm, pharmaceuticals. Leonard Stevens, vp-gm, oncology. Ronald Eastman, vp-gm, standard prods. Michael Speidel, prod grp dir, Lederle-Praxis Biologicals. Paul Wilson, vp-mktg, pharmaceuticals. Nancy Panzenbeck, dir-mktg rsch, pharmaceuticals.

ProStep, Verelan: Klemtner Advertising, New York. Debbie Glick, acct exec.

Suprax: Dorritie, Lyons & Nickel, New York. Joyce Valk, acct exec.

Novantrone: Harrison, Star, Wiener & Beitler. Meryl Fischman, acct exec.

Methotrexate, Leucovorin Calcium, Thiotepa, Novantrone, Pipracil: Dugan/Farley Communications Associates, Upper Saddle River, N.J. John Farley, exec vp.

[illegible]: Robert A. Becker Inc., New York. Stephanie Pinz, acct exec.

Maxzide, Minocin, Materna: Le Da Agency (in-house), Wayne, N.J.

FiberCon, Centrum, Caltrate, Stresstabs: Carrafiello Diehl & Associates, Irvington, N.Y. Eric Eichhorn, acct exec.

RANK: 44

American Express Co.

New York
Ad spending: $226.4 million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	21,422	34,991	-38.8
Sunday magazine	1,575	1,248	26.2
Newspaper	29,339	17,729	65.5
Outdoor	781	488	60.1
Network TV	58,191	50,561	15.1
Spot TV	28,002	30,088	-6.9
Syndicated TV	499	3,798	-86.9
Cable TV networks	5,488	2,617	109.7
Network radio	0	4,830	NA
Spot radio	10,923	7,716	41.6
Measured media	156,218	154,065	1.4
Unmeasured	70,200	63,600	10.4
Total	226,418	217,665	4.0
By top brands	**1991**	**1990**	**% chg**
American Express cards	102,988	106,608	-3.4
Shearson Lehman	16,847	6,228	170.6
AmEx travel service	16,177	10,054	60.9
AmEx travelers cheques	12,747	19,282	-33.9

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	25,763	24,322	5.9
Earnings	789	181	335.9
U.S.	**1991**	**1990**	**% chg**
Sales	21,024	19,459	8.0
Pretax income	409	315	29.8
Division sales	**1991**	**1990**	**% chg**
Travel related services	9,905	9,698	2.1
IDS financial	2,554	2,200	16.1
American Express Bank	1,503	1,814	-17.1
Shearson Lehman Bros	11,177	10,177	9.8
First Data Corp	986	827	20.3

CORPORATE PROFILE

American Express Co., the ultimate status symbol of the 1980s, hasn't found the '90s nearly as hospitable.

Last year, the combination of recession and the Persian Gulf War ate at the core of its customer base: Well-heeled frequent business travelers were either out of work or had severely curtailed their travel. And the problem wasn't temporary.

In the past few years, Visa and MasterCard issuers have hammered away at AmEx by matching many of its services and offering lower fees.

While the company as a whole showed strong earnings, the core Travel Related Services unit labored under a 59% loss to $396 million on $9.9 billion in revenues, up 2.1%. AmEx's share of U.S. general-purpose charges continued to erode, reaching 20.6%, compared with 22.3% in 1990 and 25% in the late 1980s.

AmEx vows to rebuild its brand, committing to spend about $1.1 billion this year on marketing. Jonathan Linen, ceo at AmEx-owned Shearson Lehman, was moved to president of Travel Related Services and Harvey Golub, chairman-ceo of IDS Financial Corp., took the same posts at the travel unit.

AmEx's marketing strategy is to be selective at signing up new cardmembers; to focus on retaining its loyal, upscale cardmembers; and to placate merchants who complained of high fees.

AmEx shifted the bulk of its U.S. direct marketing from Ogilvy & Mather Direct, New York, to Wunderman Worldwide and Bronner Slosberg Humphrey, Boston. Last November, Chiat/Day/Mojo, New York, was selected to replace O&M on its charge-card image account in the U.S., with O&M keeping media buying and creative promoting service establishments.

But Chiat's so-called "icon" campaign, which features a larger-than-life card, was widely criticized as a cold throwback to 1980s excesses and is being changed this month with three new TV spots that give the card a "warmer" feel. Aldo Papone, former chairman-ceo of the Travel Related Services unit who retired for health reasons in 1990, was brought back as a consultant last April to help fix the ad effort.

Media spending for AmEx's charge-card products dropped 4.4% last year to $136 million, according to LNA/Arbitron Multi-Media Service, while the company devoted more resources to direct marketing and promotions, and wrestled with the agency review.

The Shearson Lehman Bros. brokerage unit, just 18 months after hiring Chiat, abruptly dismissed the agency in August and expects to replace it by late this month. Lehman Bros., the investment banking arm, hired Hal Riney & Partners, New York, as its first agency after splitting off from Shearson.

HEADQUARTERS

American Express Co./American Express Tower/World Financial Center/ New York, N.Y. 10285/Phone: (212) 640-2000.

PERSONNEL, BRANDS, AGENCIES

AMERICAN EXPRESS TRAVEL RELATED SERVICES CO.: American Express Tower/World Financial Center/ New York, N.Y. 10285/Phone: (212) 640-2000. Phillip J. Riese, exec vp-gm, charge-card mktg; Thomas O. Ryder, exec vp-establishment svcs div and pres-publishing grp; Joan Bonnette, vp-adv; James Corcoran, vp-intl adv; Peggy Mitchell-King, vp-TRS media planning/buying; Stephen Smith, dir-TRS media planning/buying; Norma Arnold, sr vp-establishment svcs mktg; Abby Kohnstamm, sr vp-Cardmember relationship mktg; James Blann, sr vp-new Cardmember mktg; Brian Kleinberg, sr vp-Optima Card mktg; Peter Bopp, vp-Corporate Card adv; Amy McIntosh, vp-mktg, Travelers Cheque Group; Bruce Grieve, vp-consumer mktg, Travelers Cheque Group.

Personal Card, Gold Card: Chiat/Day/Mojo, New York. Steven Friedman, sr vp-grp acct dir.

Platinum Card, Optima Card, Corporate Card, cardmember relationship direct mktg: Wunderman Worldwide, New York. Joanne Zaiac, Debra Brown, Barbara Jack, sr vp-acct dirs.

Establishment Services, Travelers Cheques, direct marketing to seniors and students, U.S. media planning and buying: Ogilvy & Mather, New York. Bill Gray, sr vp-exec grp dir.

New cardmember acquisition and retention direct mktg, frequent-traveler programs: Bronner Slosberg Humphrey, Boston. Steve Humphrey, pres.

AMERICAN EXPRESS PUBLISHING CORP.: 1120 Ave. of the Americas/New York, N.Y. 10036/Phone: (212) 382-5600. Thomas O. Ryder, pres; Tony Morgano, coo; James Berrion, sr vp-grp publisher; Doug Fierro, publisher-*Food & Wine*; Alexandra Golinkin, publisher-*Travel & Leisure*; Donna Cacciotti, publisher-*Departures*; Holly Tennyson, publisher- *L.A. Style*; Thomas Hartman, publisher-*D*; Thomas Casey, publisher-*Atlanta*.

Travel & Leisure, Food & Wine, Departures: Ogilvy & Mather, New York. Bill Gray, sr vp-exec grp dir.

L.A. Style, D, Atlanta: In-house.

SHEARSON LEHMAN BROTHERS: American Express Tower/Travel Related Services/200 Vesey St./New York, N.Y. 10285/Phone: (212) 298-2000. Joseph Plumeri, pres-private client grp; Debra Isenberg, exec vp-dir mktg/adv; Catherine Kaputa, sr vp-dir adv; Barbara Glasser, vp-adv mgr.

Account up for review.

LEHMAN BROTHERS: American Express Tower/World Financial Center/New York, N.Y. 10285/Phone: (212) 298-2000. Diane Buckley, vp-adv.

Hal Riney & Partners, New York. Lisa Newman, acct exec.

IDS FINANCIAL CORP.: P.O. Box 534 /Minneapolis, Minn. 55440/Phone (612) 671-3131. Reed Saunders, sr vp-chief mktg officer.

Ogilvy & Mather, New York. Bill Gray, sr vp-exec grp dir.

RANK: 24

American Home Products Corp.

New York
Ad spending: $447.1 million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	15,803	15,178	4.1
Sunday magazine	41	0	NA
Outdoor	0	2	NA
Network TV	173,278	150,544	15.1
Spot TV	66,404	46,851	41.7
Syndicated TV	7,786	9,574	-18.7
Cable TV networks	19,088	10,828	76.3
Network radio	6,195	1,340	362.2
Spot radio	1,906	19	NA
Measured media	290,588	234,334	24.0
Unmeasured	156,500	181,100	-13.6
Total	447,088	415,434	7.6
By top brands	**1991**	**1990**	**% chg**
Advil pain reliever	54,092	47,914	12.9
Anacin pain reliever	38,093	28,691	32.8
Robitussin cough prods	36,096	20,990	72.0
Dimetapp cold products	30,195	24,086	25.4
Dristan cold products	21,376	16,414	30.2
CoAdvil cold remedy	13,772	15,457	-10.9
Preparation H products	13,007	8,320	56.3
Chef Boyardee pasta	10,808	15,907	-32.1
Primatene	9,918	5,282	87.8
Denorex shampoo	9,344	5,086	83.7

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	7,079	6,755	4.8
Earnings	1,375	1,231	11.8
U.S.	**1991**	**1990**	**% chg**
Sales	4,878	4,606	5.9
Operating income	1,335	1,446	-7.7
Division sales	**1991**	**1990**	**% chg**
Pharmaceuticals	4,018	3,463	16.0
Consumer healthcare	1,436	1,299	10.6
Medical supplies	767	745	3.0
Food prods	859	853	0.7

CORPORATE PROFILE

Advertising for American Home Products Corp.'s healthcare division exploded out of the blocks in 1991, rejuvenating sales in the U.S. division that in 1990 had slipped 11.8% below prior-year levels.

The company backed the division's products with $258 million in U.S. media, up 32.3%, to push the division's U.S. sales to $1.4 billion, up 10.5%.

AHP in effect borrowed from Peter to pay Paul by spending 17.1% less on food products, its other heavily media-advertised group. U.S. food sales remained flat at $799 million, accounting for 93% of the segment's worldwide total. U.S. healthcare sales represent about 71% of the worldwide total.

Advil continued its reign as the top ibuprofen product, climbing to 12.9% market share in the $2.3 billion-plus U.S. pain reliever market. Media support rose 7.1% for the brand, with CoAdvil being renamed Advil Cold & Sinus.

Changes for Anacin started with new advertising and packaging in 1991. In early 1992, the brand was shifted from Whitehall to the A.H. Robins division, allowing Whitehall to focus on Advil, and Partners & Shevack, New York, was dropped as the Anacin agency in favor of McCann-Erickson Worldwide. The Anacin brand got a 32.8% spending boost in 1991, to $38 million.

Supported by a 72% hike in ad spending, Robitussin cough syrup gained Maximum Strength Cough and Pediatric Cough & Cold formulas line extensions, as well as Robitussin cough drops.

The Dristan brand family was extended with Dristan Allergy and Dristan Cold & Flu formulas. Spending behind the brand grew 30.2%.

Other brands benefiting from AHP's ad spending hike were Preparation H, up 56.3%; Anbesol, up 92.3%; Primatene, up 87.8%; and Riopan, up 76.5%. Riopan, which got $8.3 million in ad support last year, was moved to Avrett, Free & Ginsberg from Partners & Shevack.

Carrafiello-Diehl & Associates, Irvington, N.Y., joined the company's roster of agencies, winning Arthritis Pain Formula and Compound W, formerly at Avrett.

American Home Food Products added several items to its Chef Boyardee line, with Teenage Mutant Ninja Turtles canned pasta and Main Meals microwaveable prepared pasta. Spending behind the brand dropped 32.1% in 1991, however.

The company's largest contributor to sales, the pharmaceutical division, grew by 16% in 1991.

HEADQUARTERS

American Home Products Corp./685 Third Ave./New York, N.Y. 10017/Phone: (212) 878-5000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Corp media buying: John F. Murray Advertising (in-house). Richard Feldheim, pres; Marianne McArdle, sr vp-dir natl TV; Kathleen Margaritov, Patricia Frohman, Kenneth Lagana, vps-natl TV supers; Emma Salgado, vp-traffic; William Levengood, vp-dir computer operations; Ingrid Loeuis, vp-treasurer.

Mil-Mor Media (in-house). Frances Slaughter, vp-gm.

WHITEHALL LABORATORIES: 685 Third Ave./New York, N.Y. 10017/Phone: (212) 878-5500. Andrew Davis, sr vp-mktg; Steve Gootzeit, vp-mktg; Holly Crosbie-Foote, vp-mktg; J. Schmitt, sr vp-bus devel.

Advil, Advil Cold & Sinus, Anbesol, Clearblue Easy, Clearplan Easy, Today Sponge: Young & Rubicam, New York. Leon Gamza, exec vp-grp dir.

Dristan sprays & tablets, Momentum, Oxipor, Preparation H: McCann-Erickson Worldwide, New York. George Biava, sr vp-grp dir.

Denorex, Primatene, Partners & Shevack, New York. Alan Yarnoff, exec vp-acct dir.

Freezone, Outgro, Semicid, Riopan: Avrett, Free & Ginsberg, New York. Tom James, exec vp, dir-client svcs; Helen Pantuso, acct super.

Arthritis Pain Formula, Compound W: Carrafiello-Diehl & Associates, Irvington, N.Y. Bob Morais, sr vp; J. Brian Gallick, acct super.

FORT DODGE LABORATORIES: 800 Fifth St. NW/Fort Dodge, Iowa 50501/Phone: (515) 955-4600. Dr. Wm. E. Ryan, dir-adv.

Brady Co., Menomonee Falls, Wis. Bert Hutchinson, sr vp.

AMERICAN HOME FOOD PRODUCTS: 685 Third Ave./New York, N.Y. 10017/Phone: (212) 878-6300. John Hilton, sr vp-mktg; Albert Soricelli, sr vp-new ventures; Rick Donnelly, vp-prod mgmt; Jules Neuberger, adv dir.

Ranch Style Beans, Pam, new products: Young & Rubicam, New York. Jordan Stanley, sr vp-mgmt super.

Chef Boyardee Pizza Mix, Crunch 'n Munch, Wheatena, Maypo, Dennison's Chili, new products: LCF&L, New York. Al Evans, exec vp; Al Magnane, exec vp-Dennison's Chili.

Gulden's, Luck's Beans, Jiffy Pop, new products: Isadore & Paulson, New York. Paul Paulson, pres.

Foodservice: Gordon Hanrahan Inc., Chicago. Mary Ellen Hanrahan, partner.

SHERWOOD MEDICAL CO.: 1915 Olive St./St. Louis, Mo. 63103/Phone: (314) 621-7788. Robert Egan, exec vp-domestic mktg; Jackie Forsland, vp-gm, API.

In-house.

WYETH-AYERST LABORATORIES: 555 E. Lancaster Ave./St. Davids, Pa. 19087/Phone: (215) 688-4400. Robert Essner, exec vp; Joseph Beshel, vp-gm, instl prod; David Bluey, dir-planning/sales/mktg; Hector Cabrera, vp-gm, Wyeth-Ayerst Puerto Rico; David Dodd, vp-gm, pediatric/consumer healthcare; Joseph Mahady, vp-mktg oper; David Pernock, vp-prof prod mktg; David Swingle, vp-prof prod sales; Martin Meaney, vp-comms.

Ativan injections, Cerubidine: Harrison, Star, Wiener & Beitler, New York. Meg Kurry, acct exec.

Premarin, Verelan, Norplant, Ismo: Klemtner Advertising, New York. Nancy Larsen, James Bargon and Colleen Cassidy, acct execs.

Inderal LA, Inderide LA, Tubex, Gestodene, Lo/Ovral, Ovral, Triphasil: Lally, McFarland & Pantel'o, New York. Nancy Barnett, acct exec.

Tenex, Micro-K: Hudson Healthcare Communications, New York. Natalie Burke, acct exec.

Children's Advil, Donnagel: Sudler & Hennessey, New York. Mark Merriman, acct exec.

Ativan oral, Bicillin, Cordarone, Collyrium, Cycrin, Grisactin, Mysoline, Nordette, Nursoy, Oral antibiotics, Orudis, Phenergan suppositories & syrups, Quinidex, Sectral, Serax, SMA, Surmontil, Wyanoids Relief Factor: In-house.

A.H. ROBINS CONSUMER PRODUCTS: 1405 Cummings Drive/Richmond, Va. 23220/Phone: (804) 257-2701. Dennis O'Donnell, vp-mktg.

Anacin, Aspirin Free Anacin: McCann-Erickson Worldwide, New York. George Biava, sr vp-grp dir.

Robitussin cough syrup and cough drops: Scali, McCabe, Sloves, New York. Lauren Fisher, exec vp-grp acct dir.

Chap Stick, Dimetapp: Carrafiello-Diehl & Associates, Irvington, N.Y. Bob Morais, sr vp; J. Brian Gallick, acct super.

RANK: 53

American Stores Co.

Salt Lake City, Utah

Ad spending: **$201.6** million

U.S. AD SPENDING ($ in thousands)

By media	**1991**	**1990**	**% chg**
Magazine	196	340	-42.4
Sunday magazine	49	132	-63.0
Newspaper	57,186	69,550	-17.8
Outdoor	660	711	-7.2
Spot TV	56,190	49,093	14.5
Spot radio	12,710	9,575	32.8
Measured media	126,990	129,401	-1.9
Unmeasured	74,600	76,000	-1.8
Total	201,590	205,401	-1.9
By top brands	**1991**	**1990**	**% chg**
Lucky food stores	65,408	52,400	24.8
Sav-on drugs	13,683	2,226	511.9
Jewel food stores	12,128	20,751	-41.6
Osco drug stores misc. merchandise	10,952	17,740	-38.3
Acme food stores	5,611	11,701	-52.0
Alpha Beta supermarkets	7,886	5,494	43.6

SALES & EARNINGS ($ in millions)

Worldwide	**1991**	**1990**	**% chg**
Sales	20,823	22,156	-6.0
Earnings	199	182	9.3

CORPORATE PROFILE

American Stores Co. plans to spend more than $2 billion over the next three years to refurbish and improve 172 stores throughout its grocery and drug store divisions. Those include Acme Markets, Jewel Food Stores, Star Market, Lucky Stores and American Drug Stores, which operates the Osco Drug and Sav-On Drug chains.

The company operates 1,488 retail units in 30 states.

The marketplace for food and drug retailing remained soft through much of late 1991 and into 1992, though the company reported total sales from continuing operations in the first quarter increased 2.6% to $4.7 billion, a reversal of the negative growth in same-store sales in 1991 vs. 1990.

American last year slipped behind Kroger Co. as the nation's supermarket sales volume leader. Part of the slippage related to the divestiture of a number of stores in the past two years.

Despite the still sluggish California economy, Lucky Stores increased operating profit 2.6% for the first quarter of 1991, vs. the same period a year earlier.

In April, American Stores completed the sale of 74 Jewel-Osco combination food and drug stores for $325 million. The facilities sold comprised all operations in Texas, Oklahoma and Florida, and some Arkansas units.

The American Drug Stores subsidiary last February acquired 63 CVS Consumer Value Stores drugstores and 22 health & beauty aid stores in southern California. These stores encompass all operating CVS stores in California with sales estimated at $152 million in 1991. They will become Sav-On Express outlets.

The division also opened its first Vision format, reflecting what the company believes is the future of drugstore retailing—a transition of stores into healthcare centers.

Acme Markets in mid-1992 moved its estimated $15 million newspaper and broadcast ad account to Reimel Carter, Philadelphia, from J. Walter Thompson USA, New York. During 1991, the division cut ad spending virtually in half.

Last year, Lucky Stores increased media spending 24.8% to $65.4 million, according to LNA/Arbitron Multi-Media Service. Jewel Food Stores, which accounts for about 38% of consumers' grocery expenditures in the Chicago area, supported its stores with more than $12 million in media, down 41.6% from 1990, while Osco spent more than $10 million, the same as 1990, LNA noted.

HEADQUARTERS

American Stores Co./709 E. South Temple/Salt Lake City, Utah 84102/P.O. Box 27447/Salt Lake City, Utah 84127-0447/Phone: (801) 539-0112.

PERSONNEL, BRANDS, AGENCIES

ACME MARKETS: 75 Valley Stream Parkway/Malvern, Pa. 19355/Phone: (215) 889-4000. Ed Spragg, vp-sales and special mktg.

Reimel Carter, Philadelphia. Tom Kubovsak, acct exec.

JEWEL FOOD STORES: 1955 W. North Ave./Melrose Park, Ill. 60160/Phone: (708) 531-6000. William Bolton, pres; Greg Josefowicz, vp-mktg.

Lois/USA, Chicago. Brad Beechen, mgmt super.

LUCKY STORES: 6300 Clark Ave./P.O. Box BB/Dublin, Calif. 94568/Phone: (510) 833-6000. Brian Carter vp-sales and merch, Northern Div; Roger Wilheim, vp-sales/ merch, Southern Div.

Grey Advertising, Los Angeles. Priscilla Wright, acct exec.

STAR MARKETS: 625 Mt. Auburn St./Cambridge, Mass. 02138/Phone (617) 661-2200. Brian Smith, vp-adv.

Rossin Greenburg Seronick, Boston. Lisa Cloutier Brown, acct super.

AMERICAN DRUG STORES: 1818 Swift Drive/Oak Brook, Ill. 60521/Phone (708) 572-5000. Arlyn White, exec vp-mktg; Kevin Tripp, vp-adv & sales.

Osco Drug: 1818 Swift Drive/Oak Brook, Ill. 60521/Phone: (708) 572-5000; **Sav-On Drug:** 1500 S. Anaheim Blvd./Anaheim, Calif. 92805/Phone: (714) 778-2300. Lois/USA, Chicago. Terry Laughlin, acct exec.

RANK: 67

AMR Corp.

Dallas

Ad spending: **$150.1** million

U.S. AD SPENDING ($ in thousands)

By media	**1991**	**1990**	**% chg**
Magazine	8,643	14,374	-39.9
Sunday magazine	85	1,315	-93.6
Newspaper	68,688	60,697	13.2
Outdoor	322	421	-23.6
Network TV	406	707	-42.6
Spot TV	22,184	21,062	5.3
Syndicated TV	145	193	-24.8
Cable TV networks	1,388	753	84.3
Network radio	0	471	NA
Spot radio	8,003	4,344	84.2
Measured media	109,863	104,339	5.3
Unmeasured	40,200	38,200	5.2
Total	150,063	142,539	5.3

SALES & EARNINGS ($ in millions)

Worldwide	**1991**	**1990**	**% chg**
Sales	12,887	11,720	10.0
Earnings	(240)	(40)	-506.1
Division sales	**1991**	**1990**	**% chg**
Passenger	10,714	9,743	10.0
Cargo	471	429	9.8
Other	910	837	8.7

CORPORATE PROFILE

American Airlines, the nation's largest carrier, shook the industry this April with a value-pricing plan aimed primarily at the business segment.

The simplified fare structure was positioned as a permanent revision that would cut first-class fares from 20% to 50%; reduce existing coach fares by 38% with no advance purchase or Saturday stayover; and slash PlanAAhead fares by up to 49%.

A $20 million multimedia campaign themed "Bringing value back to air travel" supported the plan, from agency Temerlin McClain, Dallas.

For the 12-month period through May 1992, American held a 19% share (17.1% in 1991) of domestic revenue passenger miles, followed by United Airlines at 18.5% (17.2% in '91) and Delta Air Lines at 15.5% (13.7% in '91), according to the U.S. Department of Transportation.

It remains to be seen how the new fare structure will affect the long-term financial health of the industry. Short term, the fare cuts will prove costly, coming after $2 billion in losses posted by U.S. carriers in 1991.

American responded when Northwest Airlines launched its "Parents Fly Free" summer promotion, and its limited half-price fares set off a mini fare war.

Chairman Robert Crandall has said the challenge for the 1990s will be to determine if and how American can develop the right product for short-haul markets and whether the airline can introduce low-cost service with no frills in appropriate markets.

HEADQUARTERS

AMR Corp./P.O. Box 619616/Dallas-Fort Worth Airport/Texas 75261/Phone: (817) 963-1234.

PERSONNEL, BRANDS, AGENCIES

AMERICAN AIRLINES: P.O. Box 619616/Dallas-Fort Worth Airport, Texas 75261. Michael W. Gunn, sr vp-mktg; George L. Mueller, vp-customer svcs; Jack L. Williams, vp-passenger sales; Tom Morris, mg dir-adv; Rob Britton, mgr-adv/dir mktg; Rick Fisher, mgr-intl adv.

Domestic adv: Temerlin McClain, Dallas. Paul Gold, exec vp-acct dir.

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RANK: 22

Anheuser-Busch Cos.

St. Louis
Ad spending: $508.4 million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	20,003	7,767	157.5
Sunday magazine	1,120	243	361.3
Newspaper	5,754	3,989	44.3
Outdoor	11,616	6,058	91.8
Network TV	122,922	129,009	-4.7
Spot TV	92,448	91,646	0.9
Syndicated TV	23,391	13,703	70.7
Cable TV networks	31,408	26,788	17.2
Network radio	0	983	NA
Spot radio	19,219	20,960	-8.3
Measured media	327,880	301,145	8.9
Unmeasured	180,500	157,800	14.4
Total	508,380	458,945	10.8
By top brands	**1991**	**1990**	**% chg**
Budweiser beer	212,146	184,074	15.3
Anheuser-Busch beer	26,378	7,849	236.1
Michelob beer	18,451	38,287	-51.8
Eagle snacks	16,982	7,811	117.4
O'Doul's ale	11,816	7,244	63.1
Sea World amusement parks	11,640	13,970	-16.7
Busch beer	10,698	24,173	-55.7
Busch Gardens amusement park	7,466	10,862	-31.3

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	12,634	11,612	8.8
Earnings	940	842	11.6
Division sales	**1991**	**1990**	**% chg**
Beer	8,324	8,151	2.1
Food	2,069	1,982	4.4
Entertainment	618	625	-1.2

CORPORATE PROFILE

The poor economy and an increase in the federal excise tax translated into lower beer volumes and consumers trading down.

Anheuser-Busch Cos., the nation's leader in beer sales, saw its volume drop 0.4%, its first volume decline in years. Yet, A-B did better than the total beer industry, which declined 2% in volume, and raised its share to 44.1% as consumers switched to some of its subpremium-priced beers, notably Natural Light and Busch.

A-B's superpremium Michelob brands saw volume drop, and so, to the brewer's chagrin, did the country's No. 1 brew, Budweiser, down 5.2% to 47.2 million barrels.

A-B's biggest success in the premium segment was Bud Light, up 5.1% to 12.4 million barrels. Bud Light also got a big boost in media spending, 28.2%, to $57.7 million, second in dollar weight to Budweiser's $84.2 million, up 18.6%.

The brewer is testing Michelob Golden Draft and Golden Draft Light as premium beers.

A-B is also getting more vigilant in defending its products, with a Natural Light spot attacking Coors Light in some markets. Local market advertising and direct marketing both are being increased this year.

The static growth of the U.S. beer industry has also prompted A-B to look for international growth. A-B in January took over marketing of its beers in the U.K. and began its first corporate-backed ad campaign there. It also is trying to buy a portion of the Budvar brewery in Czechoslovakia that has rights to the Budweiser name in Germany and Austria.

Busch Entertainment Corp., with more than 10 theme parks, opened more than $50 million in new attractions, supporting the moves with new ad campaigns.

A-B has also pushed ahead with its Eagle Snacks division, taking distribution national and becoming the No. 3 player in the industry. The national rollout of tortilla chips got $16.1 million in media backing, compared with only $3.3 million when in limited distribution in the prior year.

A-B made a significant media buying move this year when it took in-house the local media buying handled by D'Arcy Masius Benton & Bowles, St. Louis, and media planning by that agency and DDB Needham Worldwide, Chicago.

HEADQUARTERS

Anheuser-Busch Cos./One Busch Place/St. Louis, Mo. 63118/Phone: (314) 577-2000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Michael Roarty, exec vp-corp mktg/comms, chmn-Busch Media Grp.; Joe Castellano, vp-consumer awareness/education; Jesse Aguirre, vp-Hispanic corp relations.

Corp adv-Hispanic: Sosa, Bromley, Aguilar & Associates, San Antonio, Texas. Patsy Weser, acct super.

Black corp affairs: Caroline Jones Advertising, New York. Troy Ellen Dixon, vp-acct mgmt.

Consumer awareness: D'Arcy Masius Benton & Bowles, St. Louis. James Palumbo, sr vp-acct grp dir.

ANHEUSER-BUSCH: One Busch Place/St. Louis, Mo. 63118/Phone: (314) 577-2000. Steve Burrows, vp-brand mgmt; Tony Ponturo, vp-corp media/sports mktg; Jerry Solomon, pres-Busch Media Grp, New York; Tom Sharbaugh, vp-Budweiser; August Busch IV, dir-Budweiser brand mktg; Robert Lachky, sr brand mgr-Bud Light; Manny Flores, sr brand mgr-Bud Dry; Mike Owens, grp dir-Busch, Busch Light, Natural Light, Natural Pilsner, King Cobra, O'Doul's; Bill Braun, sr brand mgr-Busch, Busch Light; David English, brand mgr, Natural Light, Natural Pilsner, King Cobra; Anne Suppiger, brand mgr-O'Doul's; Robert J. Goughenour, grp brand dir-Michelob family; Jim Schumacker, sr brand mgr-Michelob superpremiums; Don Meyer, sr brand manager, Michelob Golden Draft, Golden Draft Light; Brian Porter, sr brand mgr-Carlsberg; Al Cummings, brand mgr-King Cobra; Scott McCune, dir-ethnic/geographic mktg.

Bud Light, Bud Dry, Busch brands, Michelob Golden Draft and Golden Light: DDB Needham Worldwide, Chicago. John Greening, sr vp-grp acct dir, beer.

Budweiser, O'Doul's, Michelob, Michelob Light, Michelob Dry, Michelob Classic Dark, Natural Light, Natural Pilsner: D'Arcy Masius Benton & Bowles, St. Louis. James Palumbo, sr vp-acct grp dir.

Carlsberg, Elephant malt liquor: TBWA Advertising, New York. Rob Rosenthal, sr vp-mgmt super.

King Cobra, Bud Light, Bud Dry (African-American): Equinox Advertising, Chicago. Stuart Rankin, Bernie Washington, Bill Daniel, partners. Stephen Baker, acct exec.

Budweiser, Michelob, Busch Hispanic: Castor Advertising, New York. Chris Daniels, sr acct exec.

Texas and California localized Bud Light geol mkt adv, natl Bud Light Hispanic, Bud Dry Hispanic and Michelob Golden Draft Hispanic: Sosa, Bromley, Aguilar & Associates, San Antonio, Texas. Patsy Weser, acct super.

New products: TBWA Kerlick Switzer, St. Louis. Art Gramer, dir acct svcs

ANHEUSER-BUSCH INTERNATIONAL: One Busch Place/St. Louis, Mo. 63118/Phone: (314) 577-3869. Jack MacDonough, exec vp-mktg.

BUSCH ENTERTAINMENT: One Busch Place/St. Louis, Mo. 63118/Phone: (314) 577-2000. Melvin L. Bilbo, vp-mktg prod devel; Barry W. Thigpen, grp mktg dir-Busch Gardens; Christopher M. Shea, grp marketing dir-Sea Worlds; Susan Busch Transou, dir-national adv/product development.

Busch Gardens, Sea World of Florida, Sea World of Ohio, Cypress Gardens, Adventure Island, Sesame Place: DDB Needham Worldwide, Chicago. Ray Gillette, sr vp-grp acct dir.

Sea World of California: D'Arcy Masius Benton & Bowles, Los Angeles. Ron Boyd, vp-mgmt super.

Sea World of Texas: GSD&M, Austin, Texas. Steve Braasch, sr vp-acct dir.

CAMPBELL-TAGGART: 6211 Lemmon Ave./Dallas, Texas 75209/Phone: (214) 358-9211. Larry Pearson, vp-mktg.

Iron Kids, Rainbow, Colonial, Grant's Farm, Earth Grains breads, Break Cake: Bloom FCA, Dallas. Kay Fowler, vp-mgmt super.

EAGLE SNACKS INC.: 8115 Preston Road, Suite 300/Dallas, Texas 75225/Phone: (214) 265-5101. William Opdyke, exec vp-sales/mktg; Dan R. Keller, vp-mktg.

Eagle potato chips, tortilla chips, honey roasted nuts and pretzels, new prod: TBWA, New York. Rob Rosenthal, sr vp-mgmt super.

ST. LOUIS NATIONAL LEAGUE BASEBALL CLUB: 250 Stadium Plaza/St. Louis, Mo. 63102/Phone: (314) 421-3060. Martie Hendin, vp-mktg; Nancy Trammell, dir-promo.

St. Louis Cardinals: Kupper Parker Communications, St. Louis. Rachelle Lindorff, vp-acct super.

RANK: 13

AT&T Co.

New York
Ad spending: $617.3 million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	48,838	65,199	-25.1
Sunday magazine	5,251	7,348	-28.5
Newspaper	28,291	43,927	-35.6
Outdoor	552	283	95.3
Network TV	171,956	244,910	-29.8
Spot TV	61,733	69,013	-10.5
Syndicated TV	18,824	19,989	-5.8
Cable TV networks	19,306	15,280	26.3
Network radio	30,109	31,197	-3.5
Spot radio	6,834	9,624	-29.0
Measured media	391,694	506,770	-22.7
Unmeasured	225,600	291,900	-22.7
Total	617,294	798,670	-22.7
By top brands	**1991**	**1990**	**% chg**
AT&T telephone services	314,535	353,879	-11.1
AT&T Co	27,202	37,998	-28.4
AT&T technologies	25,411	45,156	-43.7
AT&T telephones	15,766	19,204	-17.9

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	63,089	62,191	1.4
Earnings	522	3,104	-83.2
Division sales	**1991**	**1990**	**% chg**
Telecommunications	38,805	38,283	1.4
Products & systems	15,941	16,124	-1.1
Rentals & services	6,959	6,993	-0.5
Financial svcs & leasing	1,384	881	57.1

CORPORATE PROFILE

AT&T Co. remains dominant in the U.S. long-distance telephone market with 68% of the growing $65 billion industry, despite competitive incursions by MCI Communications Corp. and Sprint.

Early this year, AT&T struck back at MCI with an aggressive ad campaign themed "It's just not worth it," attacking the No. 2 carrier's Friends & Family discount calling plan.

In April, AT&T began a strong push in the small-business sector with its Partners in Business program to serve specific needs of small to midsize businesses.

Last year, AT&T rejiggered its overall spending, subtracting from nearly every media category except cable TV, where spending rose 26%, according to LNA/Arbitron Multi-Media Service. Corporate image ad spending was cut 28%, but AT&T's general promotion budget surged 96.7% to $54.3 million. Long-distance ad spending fell 16.5% to $126.2 million, according to LNA.

In March, AT&T launched World Connect, a calling card service targeting Americans living or traveling abroad. In April, it unveiled the Easy-Reach 700 service, allowing customers to be reached away from home via a special 700-number exchange; a TV and print campaign for the service breaks this fall via Wunderman Worldwide.

In July, AT&T began shipping its $1,500 VideoPhone, the first such full-color device to be mass-marketed. A print and TV campaign breaks this fall from N W Ayer.

AT&T's Universal credit card now ranks third in the U.S. in receivables in less than three years on the market, with more than 15 million cards now in circulation. On Universal's second anniversary in March, AT&T used network TV via spots from Lord, Dentsu & Partners to announce an incentive program that offered no annual fee for life to anyone who switched at least $1,000 from another credit card to Universal.

HEADQUARTERS

American Telephone & Telegraph Co./1301 Ave. of the Americas/New York, N.Y. 10019/Phone: (212) 841-4666.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: J. Kent Planck, corp vp-adv; Robert W. Watson, dir-adv svcs; Pete de Tagyos, Olympics dir; Mary Ann Thiem, intl brand mgr; Mary Lou Floyd, adv svcs mgr; Mike Neville, mgr bdct media; Linda Urben, corp adv mgr; Liz Mammen, corp media mgr-print; Claire Pitney, corp event mktg mgr.

Corporate adv: N W Ayer, New York. Peter Varvara, vp-mgmt super.

Corporate arts & underwriting: Serino Coyne, New York. Linda Lehman, exec vp-acct mgmt.

Black adv, Hispanic adv: UniWorld Group, New York. Herman Morales, sr vp; Linda Dukette, vp-acct super.

AT&T CONSUMER COMMUNICATIONS SVCS: 1301 Ave. of the Americas/New York, N.Y. 10019/Phone: (212) 841-4600. David Robertson, dir-adv.

Consumer long-distance: N W Ayer, New York. Rich LeFurgy, sr vp-mgmt super.

Ethnic adv, Hispanic consumer long distance: Y&R/Bravo, New York. Daisy Esposito, pres-chief creative officer.

Bus svcs: McCann-Erickson Worldwide, New York. Jim Lamond, sr vp.

Domestic and intl travel, target mkt and intl long distance: Young & Rubicam, New York. Barbara Ishfin, sr vp-mgmt super.

General consumer comms, EasyReach 700: Wunderman Cato Johnson, New York. Marjorie Kalter, exec vp-acct dir; Ann Hughes, sr vp-acct dir; Allison Knapp, mgmt super.

International military and Americans living abroad: Young & Rubicam, New York. Lisa Daniels, vp-mgmt super.

Military, college, hospitals: Keyes Martin, Springfield, N.J. Ted Lawrence, vp-mgmt super.

AT&T CORPORATE-INTERNATIONAL: 1301 Ave. of the Americas/New York, N.Y. 10019/Phone: (212) 841-4634. Mary Ann Thiem, intl brand mgr.

AT&T intl corporate adv: Ogilvy & Mather, New York. Cynthia Round, sr vp-grp dir.

INTERNATIONAL COMMUNICATIONS SERVICES: 295 N. Maple Ave./Basking Ridge, N.J. 07920/Phone: (908) 221-4000. Jackie Woodall, div mgr.

Intl comms svcs-Hispanic adv: Bravo Group, New York. Dora Diaz, acct exec.

Consumer/bus adv-Puerto Rico: Marti Flores Prieto & Wachtel, Puerto Rico.

AT&T CONSUMER PRODUCTS: 5 Wood Hollow Road/Parsippany, N.J. 07054/Phone: (201) 581-3000. Stan St. John, adv/promo dir.

Consumer telephones: N W Ayer, New York. Peter Varvara, vp-mgmt super.

BUSINESS COMMUNICATIONS SERVICES: 295 N. Maple Ave./Basking Ridge, N.J. 07920/Phone: (908) 221-2000. Susan Munroe, dist mgr.

Domestic bus, long distance, Pro WATS, 800: McCann-Erickson Worldwide, New York.

Domestic bus, long distance, direct mktg: Bronner Slosberg Humphrey, Boston. Jean Alexander, vp-assoc.

Domestic bus, PBX prods: Ogilvy & Mather, New York.

Bus comm systems: Ogilvy & Mather, New York.

UNIVERSAL CARD SERVICES: 8787 Baypine Road/Jacksonville, Fla. 32256/Phone: (904) 443-7500. Barbara Bromberg, vp-adv/mktg communs, credit card.

Universal Card: Lord, Dentsu & Partners, New York.

GENERAL BUSINESS SYSTEMS: 99 Jefferson Road/Parsippany N.J. 07054/Phone: (201) 581-5600. Jon Wiese, dir-mktg.

America's Choice Program: Wunderman Cato Johnson, New York.

Small bus systems/fax: Ogilvy & Mather, New York. Cathy Healy, asst. coord.

CAPITAL CORP.: 44 Whippany Road/Morristown, N.J. 07962-1983/Phone: (201) 397-3000. John Schneider, div mgr-financial svcs.

AT&T Credit Corp.: Carter/Cosgrove, Alexandria, Va. Vicki Williamson, vp.

Capital Corp: Wordsmith, Chatham, N.J., Don Smith, pres.

EASYLINK SERVICES: 400 Interpace Parkway/Parsippany, N.J. 07054/Phone (201) 331-4000. Jack Grasso, adv dir.

EasyLink svcs: McCann-Erickson Worldwide, New York. Hank O'Brien, exec vp-mgmt dir.

BUSINESS COMMUNICATIONS SYSTEMS: 55 Corporate Drive/Bridgewater, N.J. 08807/Phone: (908) 231-6000. Douglas Ritter, adv dir.

Ogilvy & Mather, New York.

FEDERAL SYSTEMS: 8403 Colesville Road, 16th floor/Silver Spring, Md. 20910/Phone: (301) 608-4000. Linda Edgerton, adv mgr.

FCB/Leber Katz Partners, New York. Jack McCauley, vp-mgmt dir.

AT&T MICROELECTRONICS: 2 Oak Way/Berkeley Heights, N.J. 07922/Phone (908) 771-3268. Mary Lou Ambrus, pr dir.

FCB/Leber Katz Partners, New York. Jack McCauley, vp-mgmt dir

NEW VENTURES: 101 JFK Parkway/Short Hills, N.J. 07078/Phone: (201) 564-2000. Roger Greene, adv mgr.

FCB/Leber Katz Partners, New York. Jack McCauley, vp-mgmt dir

AT&T NETWORK SYSTEMS: 475 South St./Morristown, N.J. 07962/Phone: (201) 606-2000. Wilma Mathews, pr mgr.

FCB/Leber Katz Partners, New York. Jack McCauley, vp-mgmt dir

NCR CORP.: 1700 S. Patterson Blvd./Dayton, Ohio 45479-0001/Phone: (513) 445-5000. H. John McCoy, dir-strategic promos.

Pagliaro Kuhlman, San Jose, Calif. Bob Stetson, dir client svcs.

RANK: 97

B.A.T Industries

London
Ad spending: $113.0 million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	28,647	24,776	15.6
Sunday magazine	1,514	2,944	-48.6
Newspaper	348	797	-56.4
Outdoor	24,327	9,401	158.8
Network TV	434	219	98.0
Spot TV	4,994	4,668	7.0
Network radio	0	620	NA
Spot radio	1,993	2,146	-7.2
Measured media	62,256	45,571	36.6
Unmeasured	50,700	37,100	36.7
Total	112,956	82,671	36.6
By top brands	**1991**	**1990**	**% chg**
Kool cigarettes	19,485	6,138	217.4
Capri cigarettes	18,472	15,155	21.9
Raleigh cigarettes	9,518	1,516	528.0
Farmers Insurance Group	7,533	9,257	-18.6

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	29,285	31,612	-7.4
Earnings	732	1,339	-45.3
U.S.	**1991**	**1990**	**% chg**
Sales	8,155	7,452	9.4
Profit	1,756	1,588	10.5
Division sales	**1991**	**1990**	**% chg**
Tobacco	17,321	15,362	12.7
Other trading	1,187	1,187	0.0
General financial	5,811	5,451	6.6
Life business	4,832	4,424	9.2

CORPORATE PROFILE

Strength in the value-price segment of Brown & Williamson Corp., the big U.S. tobacco unit of B.A.T Industries, helped trigger growth in an industry that suffered a 2.4% volume decline in 1991.

Market share rose slightly, up 0.8 share point to 11.1%, according to John C. Maxwell Jr., analyst with Wheat, First Securities.

Tobacco dwarfs B.A.T's other business segments. Tobacco sales were up 7.1% worldwide in pounds sterling. B.A.T's tobacco volume growth was 3% worldwide in a global market that increased only 1% in volume. The company owns the trademarks on Kent, Lucky Strike and Benson & Hedges in all but the U.S. and its territories; the brands are marketed and produced in the U.S. by Lorillard, American Tobacco Co. and Philip Morris USA, respectively.

While Brown & Williamson's full-price brands in the U.S. were down a collective 10.5% to 29.7 billion units, its value-price segment rose 30.8% to 26.9 billion, Mr. Maxwell said. Its biggest share growth was from generics in that sector, up from 1.3% to 2.1% of market. Within the value-price sector, B&W holds a 21.2% share.

B&W's share in the full-price market, which includes its Kool, Capri, Raleigh, Belair and Barclay brands, fell 0.1 share point to 7.8%.

Kool, the company's leading brand, lost share, down 0.3 share point to 4.6% on 23.5 billion unit sales, down 8.7%.

Much of B.A.T's 36.6% growth in media advertising went to repositioning Kool, which claimed $19.5 million in media, up 217.4%. The brand was updated and given a new image.

HEADQUARTERS

B.A.T Industries/Windsor House/50 Victoria St./London, England/Phone: (071) 222-7979.

PERSONNEL, BRANDS, AGENCIES

BROWN & WILLIAMSON TOBACCO CORP.: 1500 Brown & Williamson Tower/P.O. Box 35090/Louisville, Ky. 40232/Phone: (502) 568-7000. R.A. Fitzmaurice, sr vp-mktg/sales; H.E. Higgins, vp-sales; G.A. Korfhage, vp-intl sales; Karen Shultz, dir-mktg/sales admin; N.G. Naughton, dir-adv/promo; M.S. Kovatch, dir-planning/forecasting; L.R. Lewis, dir-sales support; J.L. Brumleve, S.R. Smith, mktg mgrs; C.L. Barlow, mgr mktg svcs; D.T. Klug, N.J. Wilderson, W.T. Carpenter, mgrs, mktg planning.

Kool, Capri, Raleigh, Viceroy, Belair: Campbell-Mithun-Esty, New York (domestic creative and media buying and media buying for Barclay and Richland). Nancy Korda, exec vp-acct dir; Meryl Pearlstein, mgmt super; Kristin Krumpe, acct super; Stacey Shelly, acct exec; Laura Moorhead, asst acct exec.

Barclay, Richland: Tatham/RSCG, Chicago. Ian Miller, pres-mg partner; Tom Schafer, sr partner.

FARMERS GROUP: 4680 Wilshire Blvd./Los Angeles, Calif. 90010/Phone: (213) 932-3200. Leo E. Denlea Jr., chmn-pres-ceo. **Mktg:** Martin D. Feinstein, vp-mktg; Rick Wright, adv dir.

Insurance (all types): Foote, Cone & Belding, Los Angeles. Tim McPartlin, sr vp-grp mgmt dir; Thomas R. Wood, vp-mgmt dir.

RANK: 81

Bell Atlantic Corp.

Philadelphia
Ad spending: $127.5 million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	3,035	3,427	-11.4
Newspaper	2,823	3,987	-29.2
Outdoor	644	334	92.8
Network TV	0	1,785	NA
Spot TV	30,643	41,201	-25.6
Cable TV networks	59	61	-2.8
Spot radio	7,445	7,034	5.8
Measured media	44,650	57,829	-22.8
Unmeasured	82,900	76,900	7.8
Total	127,550	134,729	-5.3
By top brands	**1991**	**1990**	**% chg**
Bell Atlantic telephone services	10,167	13,751	-26.1
Bell Atlantic	9,494	7,234	31.2
New Jersey Bell Telephone Co.	5,087	3,546	43.4

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	12,280	12,298	-0.1
Earnings	(223)	1,313	-117.0
Division sales	**1991**	**1990**	**% chg**
Local service	4,758	4,617	3.1
Network access	2,922	2,970	-1.6
Toll services	1,539	1,544	-0.3
Directory advertising	1,599	1,579	1.3
Other communication	934	918	1.7
Financial, real estate	636	773	-17.7

CORPORATE PROFILE

In a break from its traditional ad strategy, Bell Atlantic Corp. telephone companies in 1991 focused more on the consumer market. An integrated ad campaign, combining print, radio, direct response TV spots and direct mail, was started to build awareness of its IQ Services, such as Caller ID, Return Call and Repeat Call.

Bell Atlantic went retail in 1991, selling, with Northern Telecom, telephones and related equipment in retail outlets, like the Hecht's department stores in Bell Atlantic's mid-Atlantic territory. This year, Bell Atlantic phone equipment is being sold nationwide through retail outlets and catalogs.

Bell Atlantic devoted more than one-third, about $14.6 million, of its measured media spending to Yellow Pages advertising, down 14%, according to LNA/Arbitron Multi-Media Service. New Jersey Bell took the largest share, $4.5 million, to promote Yellow Pages.

Bell Atlantic is adding electronic mail service, with the ability to send messages to a wide variety of terminals, including fax machines. The action was made possible by a ruling from the FCC that allows phone companies to transmit TV programming to homes over phone lines.

In April 1992, the company completed its acquisition of Metro Mobile, making Bell Atlantic the fourth-largest mobile phone operator.

HEADQUARTERS

Bell Atlantic/1717 Arch St./Philadelphia, Pa. 19103/Phone: (215) 963-6000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Dick Alston, vp-mktg; Lisa Sherman, exec dir-adv; Jane Farthing, dir-consumer adv; Larry Barrett, dir-mktg, promo and exhibits.

Corporate products, intl: J. Walter Thompson USA, New York. Richard O'Leary, sr vp-mgmt dir.

Bell Atlantic Yellow Pages: FCB/LGK, Philadelphia. Brian Gail, pres-ceo.

Bell Atlantic Direct Marketing: Devon Direct Marketing & Advertising, Malvern, Pa. Ronald Greene, James Perry, mg dirs.

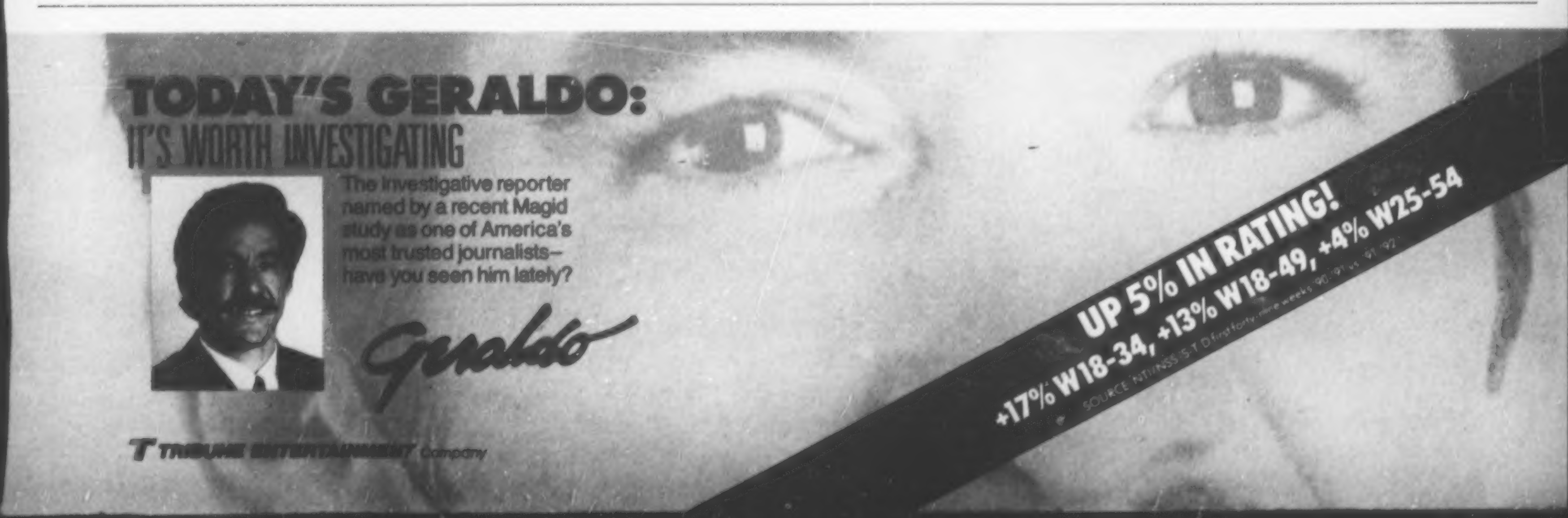
J. Walter Thompson Direct, New York. Audrey Himmelstein, vp-mgmt super.

BELL ATLANTIC MOBILE SYSTEMS: 180 Washington

Total U.S. ad spending by category and media

Category	Year	Total ad spending	Magazine	Sunday magazines	Newspaper	Outdoor	Network TV	Spot TV	Syndicated TV	Cable TV networks	Network radio	Spot radio
Automotive	1991	$5,259.1	$940.3	$38.3	$746.2	$51.9	$1,559.5	$1,480.6	$120.7	$117.7	$72.2	$131.7
	1990	5,702.9	901.2	25.5	809.3	53.0	1,790.0	1,664.8	115.7	114.1	106.7	122.5
Retail	1991	5,125.9	197.1	93.0	2,491.9	62.9	351.7	1,528.0	40.1	42.9	92.1	226.1
	1990	6,500.6	249.8	123.0	3,819.8	68.9	358.1	1,500.6	20.5	36.7	98.7	224.5
Business, consumer svcs	1991	3,582.8	443.3	28.4	1,207.2	62.7	598.3	811.2	72.8	112.2	77.2	169.4
	1990	3,952.8	518.4	41.6	1,314.0	64.6	696.3	861.5	56.8	102.7	114.1	182.8
Food	1991	3,551.9	433.4	29.1	36.5	9.2	1,443.8	974.0	346.1	141.0	41.9	96.7
	1990	3,872.9	447.5	34.7	45.4	11.0	1,663.5	1,025.2	351.7	124.7	75.1	94.1
Entertainment	1991	2,913.2	58.5	35.7	387.3	53.0	802.3	1,196.0	196.1	83.0	15.6	85.6
	1990	3,111.4	52.3	3.3	618.9	47.3	891.8	1,182.3	149.0	62.7	15.0	89.0
Toiletries & cosmetics	1991	2,249.3	631.8	21.9	6.8	2.3	958.6	293.3	215.3	92.5	8.2	18.6
	1990	2,333.5	675.6	27.3	5.4	2.7	1,034.3	279.5	188.7	87.7	17.0	15.1
Travel & hotels*	1991	2,123.2	335.4	49.1	1,064.5	48.5	212.7	233.6	8.6	49.1	33.4	88.1
	1990	2,171.8	365.7	37.6	1,043.7	49.9	187.0	312.7	8.4	36.9	42.0	87.7
Drugs & remedies	1991	1,807.9	164.8	19.5	78.2	12.5	851.6	341.4	171.3	80.2	56.3	32.1
	1990	1,697.4	160.1	17.5	118.3	13.4	787.3	321.6	134.1	62.6	56.2	26.5
Direct response cos.	1991	1,192.9	555.7	302.3	65.1	1.7	39.7	76.6	33.6	53.2	62.1	2.9
	1990	1,210.5	529.0	253.8	103.2	2.2	34.3	108.9	28.3	81.3	59.4	10.2
Candy, snacks & soft drinks	1991	1,146.2	55.2	2.4	13.5	7.0	434.3	318.3	185.1	72.2	20.5	37.7
	1990	1,231.0	64.5	3.5	22.4	10.1	452.1	382.8	168.4	52.8	29.4	45.1
Apparel, footwear	1991	904.8	416.0	21.5	7.0	11.7	235.4	88.5	58.9	41.0	7.5	17.4
	1990	911.9	426.5	29.4	13.2	7.9	230.5	100.2	52.9	38.9	4.0	8.5
Beer & wine	1991	839.6	51.6	5.4	12.8	32.2	347.0	209.2	60.1	43.5	1.5	76.2
	1990	752.1	45.5	3.5	10.3	20.0	302.1	210.4	45.2	37.0	5.0	72.9
Insurance & real estate	1991	705.3	141.6	8.9	187.3	23.3	171.5	106.2	9.1	19.0	19.1	19.2
	1990	846.9	129.9	10.2	264.2	28.4	204.1	129.3	8.9	16.6	31.3	24.1
Publishing & media	1991	700.4	195.7	11.8	194.1	34.6	40.3	137.7	12.1	19.1	21.9	33.0
	1990	741.6	216.4	7.9	233.3	38.6	29.4	130.1	5.8	23.5	17.8	38.8
Sporting goods, toys	1991	688.1	146.0	2.3	4.6	0.5	159.7	204.5	115.6	51.1	0.8	3.0
	1990	635.5	126.7	1.2	6.8	0.2	140.4	233.4	82.8	40.3	0.6	2.9
Household equipment	1991	610.3	113.1	10.6	20.8	1.1	272.0	96.1	58.5	28.7	6.9	2.4
	1990	662.0	117.9	13.8	25.8	1.3	260.4	146.7	40.6	27.9	18.1	9.4
Soaps & cleansers	1991	599.0	71.5	2.6	3.0	2.1	269.9	161.8	56.8	25.5	0.9	4.9
	1990	633.2	61.0	0.8	3.1	2.8	305.6	155.4	67.7	30.6	0.1	6.2
Computers, office equip.	1991	529.0	287.0	9.7	44.7	3.4	118.5	17.0	7.0	19.3	12.9	9.6
	1990	604.4	285.7	5.0	71.1	3.3	152.2	28.7	7.0	19.5	20.3	11.6
Cigarettes	1991	494.7	265.7	29.0	12.7	184.9	0.0	0.2	0.0	0.1	2.1	0.0
	1990	585.3	311.4	52.2	30.3	182.6	0.0	4.4	0.5	0.4	3.2	0.4
Electronic entertainment	1991	371.5	91.8	1.8	16.2	1.5	116.7	71.4	29.3	31.9	9.1	1.9
	1990	342.1	89.9	4.4	13.7	1.9	82.7	75.9	14.6	35.7	18.8	4.4
Jewelry, optical	1991	345.9	156.9	11.5	6.0	2.4	103.9	23.4	21.2	16.5	2.3	1.8
	1990	365.2	156.6	9.9	7.2	3.0	117.8	39.1	14.9	10.8	3.5	2.4
Gasoline & lubricants	1991	303.4	27.8	0.5	15.2	6.1	48.4	152.3	1.9	8.9	0.0	42.3
	1990	343.8	39.8	1.6	24.1	6.5	39.0	169.6	1.6	8.5	1.6	51.4
Building materials	1991	299.0	79.7	7.1	36.0	3.0	71.7	63.7	5.3	21.6	0.5	10.5
	1990	339.6	91.0	7.4	52.1	1.6	80.6	67.8	2.4	23.0	8.0	5.6
Liquor	1991	283.5	228.9	8.2	7.7	29.3	0.0	5.0	0.7	0.3	1.4	2.0
	1990	290.9	232.2	10.3	8.4	36.5	0.0	1.3	0.0	0.0	0.0	2.0
Household furnishings	1991	240.2	116.8	11.0	28.3	0.6	41.2	35.3	2.9	2.8	0.0	1.4
	1990	280.8	113.7	16.3	49.7	0.9	52.1	38.5	2.3	3.6	2.5	1.1
Horticulture & farming	1991	204.9	21.0	8.9	48.5	0.5	30.1	50.1	2.0	12.6	9.1	22.0
	1990	218.2	22.1	5.2	55.7	1.1	36.8	53.4	2.8	11.4	11.0	18.8
Pets & pet foods	1991	197.9	39.0	4.5	5.4	0.5	82.0	28.4	19.0	14.6	2.9	1.7
	1990	213.6	28.8	3.1	7.6	0.5	104.1	38.9	15.4	10.6	2.6	2.0
Freight, courier svcs	1991	152.2	42.8	0.2	6.6	0.1	61.7	34.3	0.0	4.1	0.2	2.2
	1990	133.1	37.1	0.2	10.5	1.4	51.4	23.6	0.1	3.7	0.4	4.7
Industrial materials	1991	106.7	57.6	0.5	5.8	1.2	27.5	10.0	0.0	3.8	0.0	0.3
	1990	128.8	64.2	1.1	9.5	0.8	44.1	2.2	0.1	4.4	1.1	1.2
Business propositions	1991	34.9	27.5	0.6	2.9	0.2	1.3	1.2	0.0	0.6	0.0	0.6
	1990	39.1	26.4	1.4	2.5	1.0	2.3	2.8	0.0	0.4	0.4	2.0
Airplanes, aviation	1991	12.6	10.1	0.0	1.5	0.2	0.1	0.7	0.0	0.1	0.0	0.0
	1990	23.0	19.3	0.1	2.4	0.1	0.2	0.4	0.0	0.1	0.3	0.2
Miscellaneous	1991	243.9	111.5	17.6	73.2	32.7	4.8	1.2	0.1	2.4	0.1	0.3
	1990	287.9	131.5	24.6	100.0	25.2	1.5	1.2	0.3	1.1	2.3	0.3
Total	1991	37,820.2	6,515.2	794.0	6,837.3	684.0	9,456.2	8,751.2	1,850.4	1,211.6	578.7	1,141.6
	1990	41,163.6	6,737.7	777.1	8,901.9	688.8	10,132.3	9,293.3	1,587.6	1,110.2	766.4	1,168.4

Notes: Dollars are in millions. * includes airline travel. See Page 72 for methodology. **Source:** LNA/Arbitron.



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Ties between the 100 Leading National Advertisers and Major League Baseball continue to build in 1991-92, evidenced by the shuffling Energizer Bunny from leader Ralston Purina that drummed in the new season in parks across the U.S. Aside from the obvious sports tie-ins for the 100, ownership has become a quest for some. Adolph Coors Co. is an investor in the new Colorado Rockies as is Levi Strauss & Co. in the Oakland A's. Anheuser-Busch Cos. owns the St. Louis Cardinals. Less direct is Philips NV's 5% investment in Blockbuster Entertainment Corp., whose Chairman-CEO Wayne Huizenga holds controlling interest in the new Florida Marlins franchise.

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Valley Road/Bedminster, N.J. 07921/Phone: (908) 306-7000. Gary Johnson, dir-adv.

W. B. Doner & Co., Baltimore. John Havrilla, vp-mgmt super.

RANK: 30

Bristol-Myers Squibb Co.

New York
Ad spending: **$352.5 million**

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	30,333	41,956	-27.7
Sunday magazine	3,644	27	NA
Newspaper	251	66	282.1
Outdoor	381	0	NA
Network TV	95,444	124,363	-23.3
Spot TV	10,357	9,580	8.1
Syndicated TV	28,494	32,559	-12.5
Cable TV networks	6,569	10,326	-36.4
Network radio	4,561	3,772	20.9
Spot radio	3,924	1,118	250.9
Measured media	183,960	223,767	-17.8
Unmeasured	168,500	205,000	-17.8
Total	352,460	428,767	-17.8

By top brands	1991	1990	% chg
Clairol hair coloring products	32,973	47,246	-30.2
Excedrin pain relievers	32,838	35,549	-7.6
Nuprin pain reliever	13,158	24,062	-45.3
Ban deodorants & antiperspirant	12,065	15,046	-19.8
Bufferin pain relievers	10,936	12,330	-11.3
Renuzit air fresheners	10,666	8,961	19.0
Comtrex cold products	9,153	11,224	-18.4
Windex cleaners	8,132	5,924	37.3
Keri	6,717	7,875	-14.7
Clairol hair products for men	6,132	6,775	-9.5

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	11,159	10,300	8.3
Earnings	2,056	1,748	17.6
U.S.	**1991**	**1990**	**% chg**
Sales	7,686	7,017	9.5
Profit	2,099	1,747	20.1
Division sales	**1991**	**1990**	**% chg**
Pharmaceuticals	5,908	5,261	12.3
Non-prescription health products	1,901	1,773	7.2
Toiletries, beauty aids	1,791	1,830	-2.1
Medical devices	1,559	1,436	8.6

CORPORATE PROFILE

Bristol-Myers Squibb Co. is planning to sell Drackett Co., the household-cleaning unit whose products include Drano, Windex, Vanish and Renuzit, so it can focus on pharmaceuticals, health and personal-care products.

Of the latter, Clairol brands again received the lion's share of measured ad spending—$45 million in 1991, down 23% from 1990. The decline may have been in anticipation of the major make-over of the entire hair coloring and haircare product lineup that began in mid-1992.

Clairol is the leading hair coloring brand, holding more than 56% of the $498 million category, according to Towne-Oller & Associates.

Under the revamp, a consistent Clairol logo will be featured on all packaging.

New advertising for Nice 'n Easy, which broke in March, features women talking about the "emotional uplift" hair coloring gives them.

New TV and print broke in July backing Ultress. Themed "Gorgeous hair is the best revenge," the campaign featured Ivana Trump.

Clairol also restaged the Condition family of shampoo and stylers around the three-in-one proposition—cleansing, conditioning and protection.

In the $2.3 billion-plus analgesics category, Bristol is the third-largest marketer behind Johnson & Johnson (Tylenol) and American Home Products Corp.'s Whitehall Laboratories (Advil).

Much of the company's analgesics growth has been through non-aspirin-based line extensions. Excedrin IB contains ibuprofen; Excedrin AF and Excedrin PM contain acetaminophen.

The Excedrin line holds a 7.1% share of the category, up from 6.9% a year earlier. Excedrin was backed with $33 million in 1991, including $10.5 million for new Excedrin PM.

Bufferin, backed with $12 million in 1991, holds a 2.3% share.

Nuprin, its top ibuprofen, held a 2.3% share, third in that segment behind Whitehall's Advil at 11.7% and Upjohn Co.'s Motrin at 3.4%. The product got a new campaign in 1991 that features tennis star Jimmy Connors and the "Nupe it" theme. However, measured spending on Nuprin declined 45% to $13 million.

The Ban antiperspirant/deodorant line was backed with $12 million in media, a 19.8% drop from 1990.

Drackett's media spending in 1991 exceeded $30 million, according to LNA/Arbitron Multi-Media Service, with Renuzit air fresheners getting $10.7 million, up 19%, Windex $8.1 million, up 37.3%, and Drano $5.4 million, down 0.9%.

HEADQUARTERS

Bristol-Myers Squibb Co./345 Park Ave./New York, N.Y. 10154/Phone: (212) 546-4000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Peter J. Spengler, vp-mktg svcs.

N. AMERICAN CONSUMER PRODS GRP: 345 Park Ave./New York, N.Y. 10154/Phone: (212) 546-4000. Peter R. Dolan, sr vp-mktg/sales, Bristol-Myers Prods; Sion Boney, vp mktg, Bristol-Myers Prods; R. Jay Uhlmansiek, dir-mktg svcs, Drackett; Michael A. DeGennaro, sr vp-prof/worldwide strategy, Clairol; M. Katherine Dwyer, vp-consumer mktg, Clairol; Robert T. Goehrke, vp-prof mktg, Clairol.

Final Net, Loving Care, Nice 'n Easy, Sea Breeze line, Instant Beauty, Clairol trade adv: DDB Needham Worldwide, New York. Mary Lou Quinlan, sr vp-mgmt super, Clairol; Tony Wright, exec vp-gr acct dir, Sea Breeze; Lucille Schwarz, sr vp-mgmt super, Sea Breeze.

Drano line, Clairesse, Miss Clairol, Category Expansion (formerly New User): Grey Advertising, New York. Bob Burruss, exec vp.

Ban Roll-on, Clairol appliances, Vanish line, Behold, Endust, Renuzit, [illegible], Fragrance Jar, Condition, Mr. Muscle, Keri Lotion, Option, Presun, Windex, Infusium, Ammens: LCF&L, New York. Robin Koval, Marty Smith, Al Magnane, vps; Stacey Batzar, Mark Tender, Lissie Diringer, acct execs; Dina Shapiro, Mark Tillinghast, asst acct execs.

O'Cedar, Twinkle: Fahlgren Martin, Cincinnati. Pat Shaw, acct super; Marty Schwalbe, sr vp-gm.

Highlighting brands, Ultress: J. Walter Thompson USA, New York. Melissa Murphy, mgmt dir; Laura Cheshire, acct dir.

[illegible]: Rosenfeld, Sirowitz, Humphrey & Strauss, New York. Mike Brewi, acct super; Garry McKinley, Todd Heyman, assoc creative dirs.

HEALTH CARE GRP: 345 Park Ave./New York, N.Y. 10154/Phone: (212) 546-4000. Thomas Bartnicki, vp-mktg ad prosthetic implant div, Zimmer; Thomas Fitzpatrick, vp-mktg and fracture mgmt, Zimmer; Joseph R. Walker, vp-gm, U.S., Convatec; Stephen Speechley, vp-sales, Linvatec; Waldron Palmer, vp-mktg ad bus devel, Xomed-Treace.

Excedrin, Therapeutic Mineral Ice: DDB Needham Worldwide, New York. Tony Wright, exec vp-gr acct dir; Lucille Schwarz, sr vp-mgmt super.

Bufferin, Comtrex: LCF&L, New York. Lissie Diringer, acct exec-Bufferin; Stacey Batzar, acct exec-Comtrex.

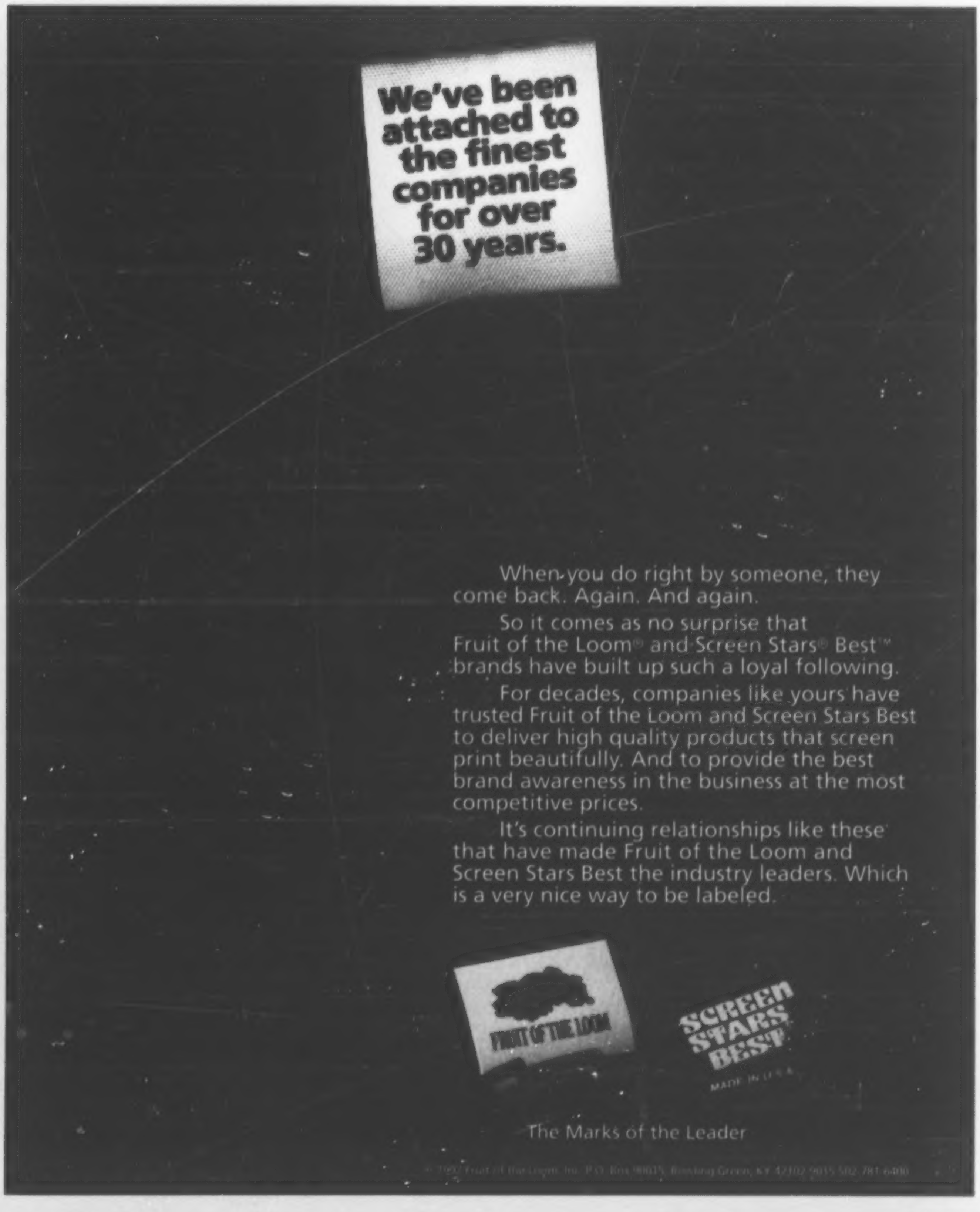
Poly-Vi-Sol Flor, Tempra: Goble & Associates, Chicago. Don Overcash, vp-mgmt super.

J. Walter Thompson USA, New York. Alan Goltz, sr vp-mgmt dir.

Gerber formula: J. Walter Thompson USA, Chicago. Jeanene Kroetch, acct super.

Nuprin: J. Walter Thompson USA, New York. Alan Goltz, sr vp-mgmt dir; Anita Dangel, acct exec.

Theragran: Saatchi & Saatchi Advertising, New



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Theragran: Saatchi & Saatchi Advertising, New York. Ray Caro, exec vp.
BRISTOL-MYERS SQUIBB U.S. PHARMACEUTICAL GROUP & MEAD JOHNSON NUTRITIONAL GROUP: Route 206 Provinceline Road/Princeton, N.J. 08543/Phone: (609) 252-4000. Gary P. Gibson, vp mktg, Bristol-Myers Squibb U.S. Pharmaceutical Div; Brian Markison, sr dir-mktg/oncology, Bristol-Myers Squibb Oncology; Donald Saltysiak, vp sales, Mead Johnson Oncology; Milt Goggins, vp sales, Westwood-Squibb Pharmaceuticals; Christine Poon, vp mktg, Squibb Diagnostics; Jerry McCabe, vp-gm, Mead Johnson Nutritionals U.S.; Rex G. Mason, vp-mktg, Mead Johnson Nutritional and Consumer Brands.

RANK: 64

Campbell Soup Co.

Camden, N.J.
Ad spending: **$164.1 million**

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	14,344	12,202	17.6
Sunday magazine	10,286	3,618	184.4
Newspaper	2,222	2,640	-15.8
Outdoor	1	52	-98.3
Network TV	37,290	52,048	-28.4
Spot TV	18,465	17,666	4.5
Syndicated TV	10,184	10,519	-3.2
Cable TV networks	3,114	4,231	-26.4
Network radio	11,294	12,536	-9.9
Spot radio	2,253	1,413	59.4
Measured media	109,454	116,926	-6.4
Unmeasured	54,600	58,400	-6.5
Total	164,054	175,326	-6.4
By top brands	**1991**	**1990**	**% chg**
Campbell's soups	56,248	53,268	5.6
Prego sauces	10,613	8,927	18.9
V-8 vegetable juice	9,600	5,901	62.7
Pepperidge Farm	6,918	12,133	-43.0
Swanson frozen foods	7,567	5,667	33.5
Vlasic condiments	5,086	3,222	57.9

SALES & EARNINGS ($ in millions)

Worldwide	1992	1991	% chg
Sales	6,263	6,204	1.0
Earnings	491	402	22.0
U.S.	**1992**	**1991**	**% chg**
Sales	4,678	4,484	4.3
Operating earnings	823	707	16.4
Division sales	**1992**	**1991**	**% chg**
Campbell U.S.	4,081	3,915	4.2
Campbell Canada	332	352	-5.8
Pepperidge Farm	597	569	4.9
International Biscuit	212	220	3.6
Campbell International	1,111	1,217	-9.0

CORPORATE PROFILE

After three years of flat to decreased ad spending, Campbell Soup Co. said it will boost U.S. ad expenditures 10% to 15% in fiscal 1993, which began Aug. 1. That will bring Campbell's budget to about $140 million.

Campbell's focus, as in the past few years, remains on "healthy" soups, entrees and cookies.

From January 1991 to the present, Campbell has introduced Healthy Request, a line of 98% fat-free soups; five spaghetti sauces with reduced sodium and fat, also under the Healthy Request name; and a line of low-fat Wholesome Choice cookies from Pepperidge Farm.

Campbell remains the leader in the $1.1 billion condensed soup category, holding a 75.3% share for the 52-week period ended April 18, 1992, according to Nielsen Marketing Research.

Soups with reduced calorie and sodium content are growing. Led by Healthy Request and ConAgra's Healthy Choice, sales of such soups totaled 16.6% of the $137.2 million in sales generated by ready-to-serve soups during just the prime January-February 1992 selling season, according to Nielsen.

Healthy Request had 6.1% of that total; soups in the healthy segment accounted for only 3% of the ready-to-serve market in 1991.

Nielsen April 18 figures showed Campbell's Home Cookin's share of the ready-to-serve market at 16.9%, down from 19.5% for all of 1991. Its Chunky brand fared even worse, dropping to 36.3% from 42.6%.

Campbell spent only $5.9 million in measured media on Home Cookin' during calendar 1991, according to LNA/Arbitron Multi-Media Service, about equal to Healthy Request but only about half the $10.9 million spent on Chunky.

Campbell in March relaunched its LeMenu premium frozen dinner line under the LeMenu New American Cuisine name. Campbell's spent $18 million to launch the line that offers 12 selections. The company cited a shift to "casual dining" *a la* Houlihan's, Bennigan's, T.G.I. Friday's as the primary reason for the restaging.

In February, Campbell introduced Swanson Fun Feast frozen meals for kids, going up against two fairly entrenched players, ConAgra Frozen Foods' Banquet Kid Cuisine and Tyson Foods' Looney Tunes. Campbell is backing Fun Feast with an estimated $8 million in 1992.

Campbell is No. 2 in the $3.4 billion frozen dinners and entrees category with a 34% share for its Swanson and LeMenu brands, according to Nielsen.

Pepperidge Farm, which holds about 6% of the $3.2 billion cookie market, got $8 million in ad support in calendar 1991. It is boosting spending to as much as $16 million by yearend 1992, primarily to support the Wholesome Choice line.

Last month, the division introduced Pepperidge Farm gravy, a line of 98% fat-free gravies in four flavors. The gravies contain 1 gram of fat per 2-ounce serving, equal to about 30 calories. They are being supported with an $8 million TV campaign.

Campbell in January yanked $25 million in frozen food business from Ogilvy & Mather, New York, stripping the longtime Campbell agency of all the marketer's business except Pepperidge Farm. The move of LeMenu Healthy, LeMenu New American Cuisine and Great Starts breakfasts consolidated all Campbell frozen foods billings at BBDO Worldwide, which already handled Swanson and Mrs. Paul's, as well as Chunky and Home Cookin' soups.

Last June, Campbell named Gary S. Moss VP-marketing services for its Campbell North and South America unit and prerident of CSC Advertising, the company's in-house ad division, succeeding Paul Mulcahy, who retired.

HEADQUARTERS

Campbell Soup Co./Campbell Place/Camden, N.J. 08103-1799/Phone: (609) 342-4800.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: D.W. Johnson, pres-ceo; H.M. Baum, pres, Campbell North and South America; G. Moss, vp-adv; C.V. McCarthy, pres-Campbell Sales Co.; A.J. Adams, vp-mktg rsch; H.P. Pelouze, dir-promo.

SOUP SECTOR: Campbell Place/Camden, N.J. 08103-1799/Phone: (609) 342-4800. Robert Bernstock, vp-soup sector; D.G. Brewster, bus dir-global soup brand mgmt; E. Sung, bus dir-dry and ramen soups; T.L. Cruikshank, sr mktg mgr-healthy soups; R. Kitchenoff, sr mktg mgr-condensed soups; J. Gallowitz, mktg mgr-condensed soups; J. Cowles, mktg mgr-cooking soups; A.D. van Beuren, bus dir-cooking and healthy soups; A.L. Wadell, mktg mgr-ready-to-serve soups; B.G. Walker, sr mktg mgr-cooking soups; P.M. Gummeson, bus dir-ready-to-serve soups; J.M. Davidson, grp mktg mgr-condensed soups; J.A. Rosati, mktg mgr-dry soups; G. Amback, assoc mktg mgr-dry soups.

Red & White condensed/dry soups: Backer Spielvogel Bates, New York. Ken Rogers, pres-coo; Norm Bierman, exec vp; Rob Desatnick, sr vp-mgmt rep.

Ready-to-serve soups: BBDO Worldwide, New York. Phil Dusenberry, chmn-ceo; Tom Carey, pres-coo; Anthony Brescia, sr vp-sr acct dir.

CONVENIENCE FOODS: Campbell Place/Camden, N.J. 08103-1799/Phone: (609) 342-4800. J.F. Van Stone, sector vp; G.T. Fassak, bus dir-frozen meals; D. Kauffman, bus dir-premium meals; J.P. Brennan, sr mktg mgr-Swanson dinners; A.R. Sakalay, sr mktg mgr-LeMenu New American Cuisine; D.M. Berkowitz, assoc mktg mgr-Swanson dinners; D. Thompson, sr mktg mgr-entrees, Hungry Man, pies, fried chicken; D. Dolby, assoc mktg mgr-entrees, Hungry Man, pies, fried chicken; S.L. Nicholas, mktg mgr-LeMenu; W.J. Tullis, mktg mgr-breakfasts; S.M. Regan, bus dir-seafood; R.J. Davis, mktg mgr-seafood; R.W. Johnston, mktg mgr-seafood.

Swanson, LeMenu New American Cuisine, Great Starts, Mrs. Paul's: BBDO Worldwide, New York. Phil Dusenberry, chmn-ceo; Anthony Brescia, sr vp-sr acct dir.

GROCERY SECTOR: Campbell Place/Camden, N.J. 08103-1799/Phone: (609) 342-4800. K. MacDonnell, sector vp; C. Monaghan, bus dir-prepared foods; D. Lynn, bus dir-beverages; W. Boundy, sr mktg mgr-red juices; H.G. Parker, mktg mgr-V8; G.K. Poirier, mktg mgr-gravy; K. Voellinger, assoc mktg mgr-gravy; C.A. Hartmann, sr mktg mgr-beans and pasta; N. Krawczyk, mktg mgr-pasta; S. Branch, assoc mktg mgr-pasta; B. Fall, assoc mktg mgr-beans.

V8 Juice, Campbell's Tomato Juice: FCB/Leber Katz Partners, New York. Bob Hirsch, sr exec vp-dir of acct mgmt.

Franco-American Gravy: W.B. Doner, Southfield, Mich. Rick Friday, sr vp-grp mgmt super.

Franco-American Pasta: Bayer Bess Vanderwarker, Chicago (project basis) Joanie Rosen, acct exec.

CONDIMENTS/SAUCES SECTOR: Campbell Place/Camden, N.J. 08103-1799/Phone: (609) 342-4800. Al Poe, sector vp; M.S. Kessler, bus director-sauces; T.C. Sager, sr mktg mgr-Prego; J. Thompson, assoc mktg mgr-Prego; L. Marshall, mktg mgr-sauces; D. Wong, mktg mgr-Open Pit; L. Klein, sr mktg mgr-Marie's/Produce Partners; D. Stalker, mktg mgr-Marie's/Produce Partners; P. Levy, bus dir-pickles; H.M. Kent, sr mktg mgr-pickles; S. Bravo, assoc mktg mgr-pickles; S. Boache, mktg mgr-olives.

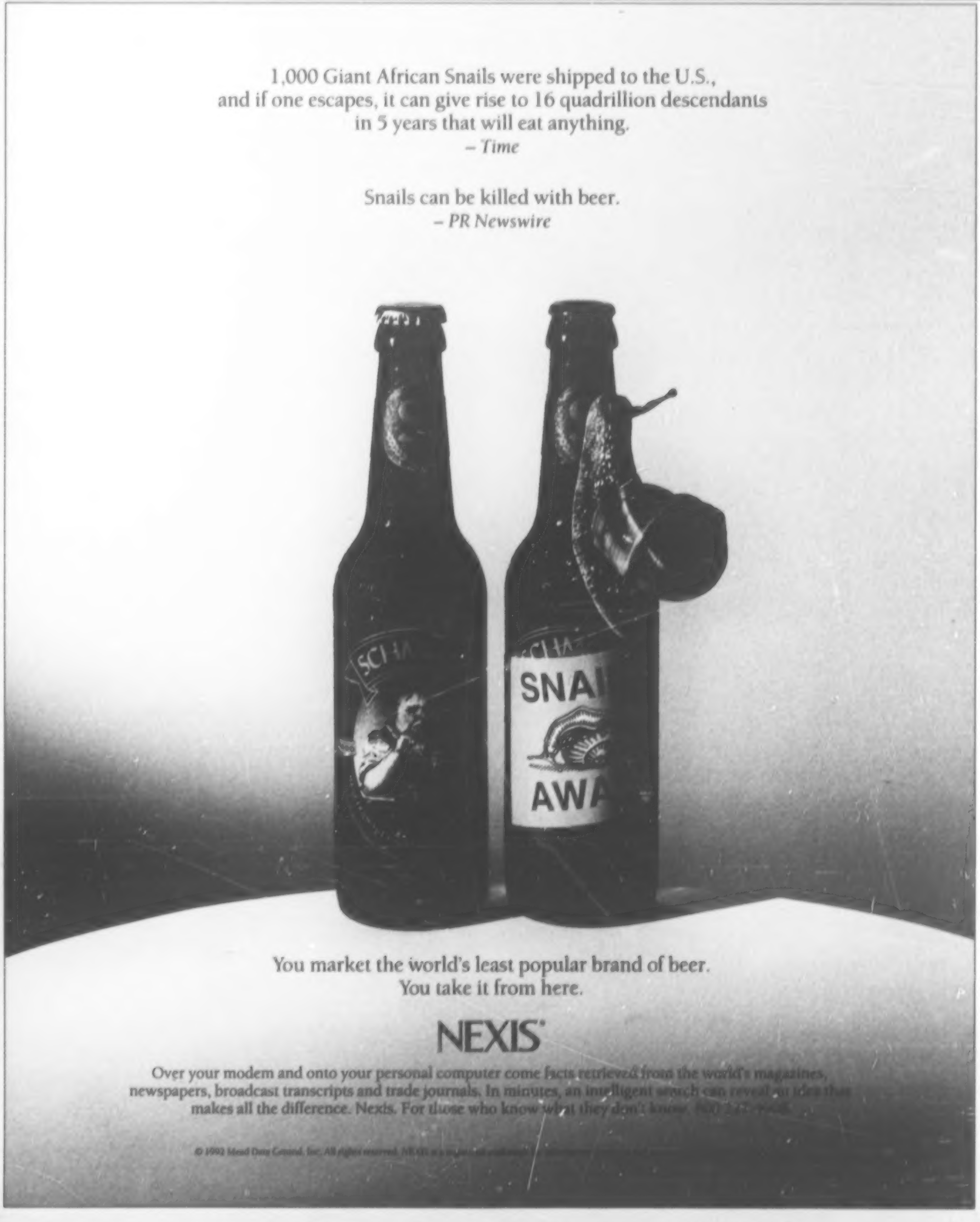
Prego spaghetti sauce: FCB/Leber Katz Partners, New York. Bob Hirsch, sr exec vp-dir of acct mgmt.

Marie's: CSC Advertising (in-house).

Vlasic and Open Pit: W.B. Doner, Southfield, Mich. Rick Friday, sr vp-group mgmt super.

PEPPERIDGE FARM: 595 Westport Ave./Norwalk, Conn. 06851/P.O. Box 5500/Norwalk, Conn. 06856/Norwalk, Conn. 06851/Phone: (203) 846-7000. R.A. Shea, pres; R.W. Urbain, vp-gm, biscuit; C.W. Rydin, vp-gm, bakery; P.J. Callaghan, gm, frozen; B.L. Gustaitis, vp-gm, foodservice; D.K. Young, gm, mail order; W.R. Enchorman, dir-mktg, biscuit; E.A. Anderson, dir-mktg, bakery; C.E. Woodward, dir-mktg, foodservice; D.F. O'Brien, dir-mktg, frozen.

Ogilvy & Mather, New York. Cynthia Rounds,



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sr vp-exec grp dir.

CAMPBELL FOODSERVICE CO.: Campbell Place/Camden, N.J. 08103-1799/Phone: (609) 342-4800. J.L. Patten, pres; Jack Kelly, bus dir; E.A. Lynn, sr mktg mgr; W.J. Caskey, vp-sales; J.A. Blauner, sr mktg mgr; B. McGorry, sr mktg mgr; K. Patton, assoc mktg mgr. In-house.

GODIVA CHOCOLATIER: 260 Madison Ave./New York, N.Y. 10016/Phone: (212) 951-2888. D. Albright, pres; G. Dunkin, vp-mktg.

Margeotes, Fertitta & Weiss, New York. G. Fertitta, pres; J. Weiss, exec vp-creative director.

RANK: 94

Canon Inc.

Tokyo

Ad spending: $117.6 million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	23,901	32,950	-27.5
Newspaper	3,648	1,688	116.1
Outdoor	553	546	1.3
Network TV	29,390	25,226	16.5
Spot TV	3,674	2,636	39.4
Syndicated TV	1,484	1,166	27.3
Cable TV networks	1,101	740	48.7
Network radio	912	0	NA
Spot radio	0	735	NA
Measured media	64,662	65,687	-1.6
Unmeasured	52,900	53,800	-1.7
Total	117,562	119,487	-1.6
By top brands	**1991**	**1990**	**% chg**
Canon duplicating equipment	23,586	26,557	-11.2
Canon cameras & accessories	19,183	21,486	-10.7
Canon video equipment	7,482	5,196	44.0
Canon computers	6,696	5,186	29.2

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	14,951	12,800	16.8
Earnings	417	455	-8.3
U.S.	**1991**	**1990**	**% chg**
Sales	4,349	3,820	13.8
Operating income	NA	NA	NA
Division sales	**1991**	**1990**	**% chg**
Copiers	5,768	5,082	13.5
Computer peripherals	3,378	2,574	31.2
Business systems	2,657	2,434	9.2
Cameras	2,095	1,856	12.9
Optical products	1,275	854	49.2

CORPORATE PROFILE

Canon's ambitious ad program, part of its five-year "global corporation plan," stalled last year as sluggish economies in the U.S. and elsewhere reduced demand for company products and the funds available for advertising.

Canon's worldwide ad spending fell 2.4% to $563.9 million, after a 32.8% increase in 1990.

Canon USA's ad spending dropped 1.6% last year, following a 19.8% hike in 1990, much of it in support of cameras and accessories. But the camera business, particularly the single-lens-reflex 35mm market that's been Canon's strength, has slumped. Canon cut its U.S. camera advertising by 10.7% to $19.2 million last year, according to LNA/Arbitron Multi-Media Service.

The company believes its EOS Rebel, which it continued to advertise using tennis star Andre Agassi, retained its No. 1 share in the high-quality 35mm amateur market. The point-and-shoot segment, in which Canon is well-established with its Sure Shot line, has been stronger but not nearly as robust as the disposable market, which grew an estimated 50% last year. Canon has no entry in the disposable market.

In copiers, Canon believes it's poised for significant growth when the economy recovers, thanks to its leadership position in color. According to market research company Dataquest, Canon dominated the color copier market with a 56% share last year, up about 8 percentage points from 1990. It also kept its No. 1 position in plain-paper copiers with a 26.6% share, about the same as in 1990.

Computer printers, also benefiting from Canon's bubble-jet and laser technology, have been a bright spot for the company, posting a 21.5% rise in worldwide sales last year. Canon's U.S. advertising on printers increased sevenfold to $5.8 million last year, with network TV snaring the lion's share.

HEADQUARTERS

Canon USA/One Canon Plaza/Lake Success, N.Y. 11042/Phone: (516) 488-6700.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Hajime Hirai, vp-gm, comms.

Canon business machines, camcorders: Dentsu Corp. of America, New York. Norman Hajjar, sr vp-dir, client svcs.

Canon cameras: Grey Advertising, New York. Jeff Levine, sr vp-grp mgmt super.

Public relations: Rowland Co., New York. Mark Weiss, pres Rowland USA.

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For advertising sales, call your National Geographic TRAVELER representative or Linda Cherry, Advertising Director, at (212) 974-1700.

RANK: 66

Carter Hawley Hale Stores

Los Angeles

Ad spending: $151.9 million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	100	169	-40.8
Sunday magazine	1,931	1,143	68.9
Newspaper	70,497	72,791	-3.2
Outdoor	3	10	-73.0
Spot TV	9,716	11,037	-12.0
Spot radio	642	786	-18.3
Measured media	82,888	85,936	-3.5
Unmeasured	69,000	71,500	-3.5
Total	151,888	157,436	-3.5
By top brands	**1991**	**1990**	**% chg**
Broadway stores apparel	21,999	18,013	22.1
Broadway stores misc merchandise	17,434	19,641	-11.2
Broadway department stores	13,707	13,319	2.9
Emporium (misc)	5,397	7,518	-28.2
Emporium (hsehold)	5,303	5,894	-10.0

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	2,128	2,533	-16.0
Earnings	(217)	(120)	-81.2

CORPORATE PROFILE

Carter Hawley Hale Stores, the West Coast's biggest department store chain, was set to emerge from bankruptcy reorganization by the end of this month virtually intact but with new owners.

Carter Hawley, overwhelmed by debt and the recession, filed for Chapter 11 reorganization in February 1991, when it had 88 stores in six Western states. When Carter Hawley emerges, it will operate 87 stores, and the Zell/Chilmark Fund, which invests in troubled companies, will own a 75% stake.

Chicago investor Sam Zell, who controls the investment fund, said he intends to build Carter Hawley's retail business.

In a massive cost-cutting move, Carter Hawley last March merged administrative, merchandising, marketing, advertising and operating functions of its four divisions. Carter Hawley retained the names of the former divisions—The Broadway, Broadway Southwest, Emporium and Weinstocks—on the stores in local markets.

Carter Hawley maintained a heavy ad schedule in 1991 despite the bankruptcy filing. Measured spending in 1991 dipped by 3.5% from the 1990 level after factoring out spending on a Virginia chain, Thalhimer Bros., that Carter Hawley sold in December 1990, according to LNA/Arbitron Multi-Media Service.

HEADQUARTERS

Carter Hawley Hale Stores/444 S. Flower St./Los Angeles, Calif. 90071-2900/Phone: (213) 620-0150.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Josephine Lawley, sr vp-mktg/sales promo; Joel Ely, vp-creative dir.

THE BROADWAY (Southern Calif.): 3880 N. Mission Road/Los Angeles, Calif. 90031/Phone: (213) 227-2000; **THE BROADWAY (Southwest):** 4000 Siesta Mall/Mesa, Ariz. 85202/Phone: (602) 835-4500; **THE EMPORIUM:** 835 Market St./San Francisco, Calif. 34103/Phone: (415) 764-2222; **WEINSTOCKS:** Sixth & K Sts./Sacramento, Calif. 95814/Phone: (916) 449-8888. In-house (creative).

Time Buying Services, New York (broadcast media buying). Michael Dunne, vp-acct mgr.

RANK: 20

Chrysler Corp.

Highland Park, Mich.

Ad spending: $531.1 million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	106,682	103,492	3.1
Sunday magazine	12,137	3,611	236.1
Newspaper	7,404	12,002	-38.3
Outdoor	1,028	966	6.4
Network TV	176,182	190,014	-7.3
Spot TV	68,104	56,825	19.8
Syndicated TV	5,583	10,872	-48.7
Cable TV networks	12,904	9,239	39.7
Network radio	14,640	9,994	46.5
Spot radio	10,126	15,796	-35.9
Measured media	414,789	412,810	0.5
Unmeasured	116,300	115,700	0.5
Total	531,089	528,510	0.5
By top brands	**1991**	**1990**	**% chg**
Chrysler cars	107,092	135,894	-21.2
Dodge cars	92,912	82,997	11.9
Dodge trucks & vans	81,689	45,142	81.0
Jeep trucks & vans	58,172	52,850	10.1
Plymouth trucks & vans	19,244	9,468	103.3
Plymouth cars	16,901	34,440	-50.9
Eagle cars	12,385	27,932	-55.7
Mopar parts & service	8,214	7,440	10.4
Dollar rent-a-car services	7,985	1,326	502.0
Thrifty rent-a-car systems	5,295	5,742	-7.8

SALES & EARNINGS ($ in millions)			
Worldwide	**1991**	**1990**	**% chg**
Sales	29,370	30,620	-4.1
Earnings	(795)	68	NA
U.S.	**1991**	**1990**	**% chg**
Sales	24,537	26,887	-8.7
Loss from cont. op.	(1,165)	(84)	NA
Division sales	**1991**	**1990**	**% chg**
Car & truck	26,182	27,009	-3.1
Financial svcs	3,221	3,774	-14.7

CORPORATE PROFILE

The Lee Iacocca era at Chrysler Corp. drew toward a close in 1992 but not before the chairman presided over the company's most important new-car introduction in a decade.

Speculation about succession plans ended in March, when Chrysler's board hired Robert Eaton, who had been president of General Motors Europe, as vice chairman and successor to Mr. Iacocca when he retires at the end of the year.

Mr. Iacocca, who began appearing in Chrysler advertising in 1980, filmed what was purported to be his last ad, a corporate spot scheduled to run this month for the company's new family-size sedans.

Automotive press and analysts have lavished praise on the so-called LH cars—Dodge Intrepid, Eagle Vision and Chrysler Concorde. These cars are scheduled to be officially launched in November. Chrysler is banking on the new sedans to prove it can build world-class products and to boost its sales in the big-volume center of the new-car market.

Chrysler was expected to spend $70 million through the end of 1992 advertising the LH cars. The hefty budget indicated the importance of the launch, which some observers compared with the introduction of the K cars in 1980, the products that helped stave off bankruptcy.

The new sedans capped off an impressive 1992 new-product assault that earlier took in the $50,000 Dodge Viper sports car and the new Jeep Grand Cherokee.

Collectors were paying up to $200,000 for early units of the limited-volume Viper, a V-10 powered two-seat convertible. Chrysler positioned the Grand Cherokee as "the new Jeep" and backed it with pre-launch commercials during the Winter Olympics on CBS and then a $40 million, six-week effort that began in April.

Incentives on the company's category-leading minivans helped lead to a strong 1992 surge in truck sales that more than offset a small decline in car sales.

Overall, through July, Chrysler sold 983,511 vehicles in 1992, up 10.4% from the same period in 1991. Chrysler's share of the new-vehicle market rose to 12.9% for the first seven months of '92, from 12.1% in the same period of '91.

The sales improvements, combined with a continuing cost-cutting program, boosted the bottom line. Chrysler reported net earnings of $165 million in the first half of 1992, vs. a loss of $810 million in the first half of '91.

Overall in 1991, Chrysler's total vehicle sales in the U.S. fell 11.2% from the year before, to 1.5 million units, while the company's market share remained at 12.2%.

Chrysler plans to restructure in the next few years by consolidating its three selling divisions into two and dropping the Plymouth or Eagle brand, or both.

HEADQUARTERS

Chrysler Corp./12000 Chrysler Drive/Highland Park, Mich. 48288-1919/Phone: (313) 956-5741.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Theodor Cunningham, exec vp-sales/mktg; John Damoose, vp-mktg; Joseph Cappy, vp-intl operations; A.C. Liebler, vp-comms; Martin Levine, gm-Dodge; Steven Torok, gm-Chrysler/Plymouth; Larry Baker, gm-Jeep/Eagle; Thomas McAlear, dir-mktg operations; Dave Rooney, mgr-corp adv; James Julow, mgr-adv/media relations; Raymond Dreyfus, media exec-Chrysler/Plymouth; Thomas Peyton, media exec-Jeep/Eagle; Robert Saltsman, media exec-Dodge.

DODGE DIV: 12000 Chrysler Drive/CIMS 414-04-15/Highland Park, Mich. 48288-1919/Phone: (313) 252-7910.

Dodge car & truck: BBDO Worldwide, Southfield, Mich. William Oswald, pres-ceo.

JEEP/EAGLE DIV: 12000 Chrysler Drive/CIMS 414-05-40/Highland Park, Mich. 48288-1919/Phone: (313) 956-3215.

Jeep and Eagle adv: Campbell-Mithun-Esty, Southfield, Mich.

CHRYSLER/PLYMOUTH: 12000 Chrysler Drive/CIMS 414-04-41/Highland Park, Mich. 48288-1919/Phone: (313) 956-5485.

Chrysler/Plymouth, corp adv: Bozell, New York and Southfield, Mich. Alan Levenstein, vice chmn; Kim Gaynor, exec vp-genl mgr Detroit.

Campbell-Mithun-Esty, Southfield, Mich. Mike Vogel, ceo.

Minority adv: Lockhart & Pettus, New York. Keith Lockhart, pres.

Hispanic adv: Montemayor y Associates, San Antonio, Texas. Carlos Montemayor, pres.

Corporate merch, sales promo & training, Chrysler Credit Corp., Chrysler Fleet Operations, Chrysler Service & Parts Operation: Ross Roy, Bloomfield Hills, Mich. Glen Fortinberry, chmn-ceo, Ross Roy Group; Richard Ward, pres-RR Comms.

RANK: 95

Ciba-Geigy

Basel, Switzerland

Ad spending: **$115.4** million

U.S. AD SPENDING ($ in thousands)			
By media	**1991**	**1990**	**% chg**
Magazine	18,776	13,302	41.2
Sunday magazine	2,030	420	383.1
Newspaper	1,988	121	NA
Outdoor	2	0	NA
Network TV	7,092	12,624	-43.8
Spot TV	2,446	3,667	-33.3
Syndicated TV	5,914	5,476	8.0
Cable TV networks	609	497	22.5
Network radio	2,154	4,076	-47.2
Spot radio	7,749	6,259	23.8
Measured media	48,761	46,443	5.0
Unmeasured	66,600	63,400	5.0
Total	115,361	109,843	5.0
By top brands	**1991**	**1990**	**% chg**
Estraderm patch	8,028	8,954	-10.3
Acutrim diet aids	6,764	7,738	-12.6
Doans pills	5,847	5,824	0.4
Eucolyptomint	5,836	8,310	-29.8
Interceptor pet drugs	5,196	891	483.0
Actigall medication	5,156	0	NA

SALES & EARNINGS ($ in millions)			
Worldwide	**1991**	**1990**	**% chg**
Sales	15,903	15,482	2.7
Earnings	386	478	-19.3
U.S.	**1991**	**1990**	**% chg**
Sales	4,247	4,044	5.0
Division sales	**1991**	**1990**	**% chg**
Healthcare	5,796	5,348	8.4
Agriculture	3,554	3,175	11.9
Industry	6,263	6,632	-5.6

CORPORATE PROFILE

With competition heating up in the smoking cessation market, Ciba-Geigy Corp. is protecting its Habitrol franchise this year with its biggest media investment ever in support of a single brand. In the first quarter alone, Habitrol spending came to 38% of what the company spent in all of 1991.

Early entrant Habitrol is perched atop the market with a 60% share, spending $17.4 million in the first quarter, its introductory period. Such heavy spending took advantage of production snafus that hurt Nicoderm, its main competition from Marion Merrell Dow.

For the first half of 1992, Ciba-Geigy's net profit rose 12% worldwide on a sales increase of 12%. Analysts had predicted profit to hit the 17%-20% range, however. Profits were affected by the heavy marketing expenses for the nicotine patch, the company said.

Among other consumer products, Ciba-Geigy continues strong support behind Acutrim, an appetite suppressant, though spending fell 11.7% to $6.8 million last year. Acutrim ranked second in the $102 million diet aid market with a 16.2% share, noted Towne-Oller & Associates.

HEADQUARTERS

Ciba-Geigy Ltd./Postfach/CH 4002/Basel, Switzerland

Ciba-Geigy Corp./444 Saw Mill River Road/Ardsley, N.Y. 10502-2699/Phone: (914) 479-5000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: William Sheldon, sr vp-mktg; Bill Baliard, exec dir, adv/sales promo. C&G Advertising Agency (in-house), Summit, N.J. Bill Ballard, pres.

PHARMACEUTICALS DIV: 556 Morris Ave./Summit, N.J. 07901/Phone: (908) 277-5000.

Doan's, Q-Vel, Fiberall: Ketchum Advertising, New York. Sarah Whiting, acct exec.

Acutrim, Dulcolax: Jordan, McGrath, Case & Taylor, New York. Laurie Rossman, acct super.

Habitrol: Dorf & Stanton, New York. Linda Recupero, acct exec-vp; Jeyran Gharajedaghi, Jay Wright, asst acct execs.

AGRICULTURAL DIV: 410 Swing Road/P.O. Box 18300/Greensboro, N.C. 27419-8300/Phone: (919) 632-6000. Larry Spickler, comms svcs mgr.

Turf and ornamental prods: Howard, Merrell & Partners, Raleigh, N.C. Mike Hoyt, acct super.

Insecticides, pesticides, fungicides: Ketchum Advertising, San Francisco. Russell Woods, acct super.

Herbicides and fungicides: Martin/Williams, Minneapolis. Tim Burke, acct super

CIBA VISION CORP.: 11460 Johns Creek Parkway/Duluth, Ga. 30136/Phone: (404) 448-1200. Stuart Heap, sr vp-sales/mktg.

Professional advertising, promo; consumer and prof pr: Dorland Sweeney Jones, Philadelphia. Rita Sweeney, dir-acct svcs.

Consumer adv: McCaffrey & McCall, New York. Burt Flounders, mgmt super.

Consumer promo: QLM Associates, Princeton, N.J. Bob Lipsky, mgmt super.

RANK: 49

Circuit City Stores

Richmond, Va.

Ad spending: **$213.7** million

U.S. AD SPENDING ($ in thousands)			
By media	**1991**	**1990**	**% chg**
Magazine	5	0	NA
Sunday magazine	515	0	NA
Newspaper	73,290	41,254	77.7
Outdoor	6	0	NA
Spot TV	54,246	50,294	7.9
Cable TV networks	0	0	NA
Spot radio	100	250	-60.0
Measured media	128,161	91,797	39.6
Unmeasured	85,500	61,200	39.7
Total	213,661	152,997	39.7

SALES & EARNINGS ($ in millions)			
Worldwide	**1992**	**1991**	**% chg**
Sales	2,790	2,367	17.9
Earnings	78	57	38.1

CORPORATE PROFILE

The recession, an industrywide decline in both sales and new-product introductions, and increased competition only stiffened Circuit City's resolve to remain the retail leader in both consumer electronics and appliances.

The nation's No. 1 electronics specialty chain focused both on continued growth of its giant single-standing Superstores format and on its smaller format Impulse outlets, which are tucked into major shopping malls.

In the fiscal year ended Feb. 19, the chain opened 27 Superstores, averaging 32,000 square feet, and 20 Impulse stores, with an average of 3,000 square feet.

But heavy promotional pricing during the latter half of the year left same-store sales up only 1%. In Los Angeles, one of its top markets, 30 competitor superstores opened in 1991.

Circuit City believes it can expand sales and earnings 15% to 20% annually for several years primarily by opening new stores. Total sales in fiscal 1992 were up 18%.

The company's expansion strategy is based on two principles: regional concentration and clear market leadership. This year, Circuit City will enter San Antonio and Corpus Christi, Texas; Baton Rouge, La.; Oklahoma City and Tulsa, Okla.; and Tucson, Ariz., in addition to expanding existing markets.

Thirty new Superstores are planned this fiscal year.

By the end of fiscal 1992, there were 34 Impulse outlets, up from 14 in the prior year. Impulse boutiques, which aren't identified as being Circuit City stores, are scattered throughout Circuit City's marketing areas.

The company seeks clear market leadership to provide the critical mass to justify a barrage of newspaper advertising.

The strategy has given it a 23% share of the estimated $8.8 billion national consumer electronics sales and 10% of the national $4.8 billion major appliance category. Circuit City is still absent from many top markets.

Circuit City concentrated spending on print including tabloid circulars and run-of-press newspaper ads. Print is supplemented in local markets by radio and TV.

J. Walter Thompson USA, New York, lost the Circuit City account in 1991, first losing media buying responsibilities in May and creative a month later; both went in-house.

HEADQUARTERS

Circuit City Stores/9950 Mayland Drive/Richmond, Va. 23233-1464/Phone: (804) 527-4000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE:

Circuit City stores, Circuit City Superstores: Richard Birnbaum, sr vp-mktg.

In-house.

Top 25 Sunday magazine spenders

Rank	Advertiser	Sunday magazine spending 1991	1990	% chg
1	**National Syndications**	$59.0	$50.3	17.3
2	**American Protection Industries**	40.6	33.9	19.9
3	**Sony Corp.**	38.6	26.3	46.4
4	**Bradford Exchange**	29.5	14.2	107.8
5	**Brown-Forman Co.**	22.3	13.7	62.9
6	**Bertelsmann AG**	17.0	11.9	43.1
7	**General Motors Corp.**	15.8	9.1	73.4
8	**Wal-Mart Stores**	15.0	11.7	27.7
9	**Philip Morris Cos.**	12.4	15.4	-19.6
10	**Weekend Shopper**	12.4	9.5	29.8
11	**Chrysler Corp.**	12.1	3.6	236.1
12	**American Brands**	11.8	19.5	-39.4
13	**Campbell Soup Co.**	10.3	3.6	184.4
14	**MBI Inc.** (Danbury Mint)	9.0	9.2	-2.2
15	**Hallmark Cards**	8.0	6.4	23.5
16	**Sherwin-Williams Co.**	8.0	0.3	NA
17	**Stanhome Inc.**	7.6	7.9	-3.9
18	**Cotter & Co.**	7.5	8.0	-5.8
19	**Dow Chemical Co.**	7.3	7.0	5.1
20	**Kmart Corp.**	6.9	6.6	4.5
21	**Time Warner**	6.7	4.2	61.3
22	**Gap Stores**	6.3	2.7	129.7
23	**RJR Nabisco**	6.3	9.1	-31.5
24	**Nestle SA**	5.4	4.6	16.3
25	**AT&T Co.**	5.3	7.3	-28.5

Notes: Dollars are in millions. **Source:** LNA/Arbitron. See Page 72 for methodology.

RANK: 58

Clorox Co.

Oakland, Calif.

Ad spending: **$182.6** million

U.S. AD SPENDING ($ in thousands)			
By media	**1991**	**1990**	**% chg**
Magazine	9,778	13,920	-29.8
Sunday magazine	172	834	-79.4
Newspaper	724	0	NA
Outdoor	12	36	-67.2
Network TV	72,524	58,040	25.0
Spot TV	22,577	32,205	-29.9
Syndicated TV	12,791	12,644	1.2
Cable TV networks	8,957	10,759	-16.7
Spot radio	247	643	-61.6
Measured media	127,781	129,081	-1.0
Unmeasured	54,800	44,300	23.7
Total	182,581	173,381	5.3
By top brands	**1991**	**1990**	**% chg**
Clorox laundry products	27,795	30,497	-8.9
Hidden Valley dressings	22,431	26,995	-16.9
Clorox cleanser	10,422	995	947.2
Pine-Sol disinfectants	10,405	10,479	-0.7
Kingsford charcoal	9,002	7,711	16.7
Soft Scrub cleanser	8,487	7,441	14.1
Control cat litter	7,354	2,715	170.9
Liquid plumr drain opener	6,746	14,174	-52.4
Combat insecticides	5,369	5,301	1.3
Formula 409 cleaner	5,260	6,090	-13.6

SALES & EARNINGS ($ in millions)			
Worldwide	**1992**	**1991**	**% chg**
Sales	1,717	1,647	4.3
Earnings	99	53	87.1

CORPORATE PROFILE

Clorox Co. intends to be back on track, but not until 1994. It will spend fiscal 1993 pushing new products in its core areas, including 10 home-cleaning items in test that won't benefit the bottom line until 1993.

That's the course mapped out by new Chairman-CEO G. Craig Sullivan, who seeks to restore Clorox's profitability. Earnings have lagged behind the double-digit earnings-to-sales ratios of the mid-to-late '80s.

The company in 1991 ended its effort to market Clorox laundry detergent and in 1992 put one far-flung division, the Prince Castle restaurant equipment subsidiary, up for sale. Analysts expect Clorox to exit other tangential businesses, most notably bottled water.

That should allow Clorox to concentrate on its basic brands in such areas as bleach, household cleaners and salad dressings. Clorox also intends to expand international sales—4.3% of fiscal 1991 revenues, according to PaineWebber analyst Andrew Shore—by pursuing joint ventures.

In the U.S., Clorox introduced Scoop Fresh, a scoopable cat litter, nationally in January. This spring, it expanded nationally a lemon-scent version of liquid Clorox 2 all-fabric bleach, to be followed by a restaging of dry Clorox 2. The line has been clobbered by growing sales of detergents-with-bleach.

Clorox had media spending of $12.2 million for its Clorox 2 line in 1991, down 24.6%. Spending on the flagship Clorox liquid bleach jumped 21.7% to $14.4 million, according to LNA/Arbitron Multi-Media Service.

Clorox in June changed the name of one of its most successful new-product offerings, Take Heart salad dressings, to Hidden Valley Ranch Low Fat to satisfy a complaint by the FDA. Clorox introduced Take Heart in February 1990.

Clorox backed Take Heart with $5.6 million in media in 1991, half the $11.1 million spent in the launch year. Spending on the Hidden Valley Ranch line of dressings jumped 49%, to $16 million, in 1991 to become the company's most-advertised brand, noted LNA.

At midyear 1992, Hidden Valley held a 9.6% share of the $1.12 billion salad dressings market. A 20% boost in sales propelled the brand from an 8.7% share at midyear 1991, according to Nielsen Marketing Research.

The company in 1991 spent $20.8 million on media for its two big dilutable cleaners, split between Pine-Sol, acquired in August 1990, and Clorox Clean-Up, introduced nationally in May 1991. That virtually tripled what the brands received in 1990.

HEADQUARTERS

Clorox Co./1221 Broadway/Oakland, Calif. 94612/Phone: (510) 271-7000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Peter Louras, grp vp; Don Murray, vp-household prods; Jack Robertson, vp-Kingsford prods; Larry Peiros, dir-mktg, household prods; Robert Klaus, gm-foodservice prods; K.S. Koelman, dir-mktg, foodservice prods; Richard Conti, vp-intl; R.H. Bolte, dir-adv & promo svcs; Janet Brady, vp-corp mktg svcs; David L. Goodman, vp-corp affairs.

Clorox bleach, Clorox 2, liquid Clorox 2, Clorox Pre-Wash, Formula 409, Tackle, Tilex, new products: Foote, Cone & Belding, San Francisco. Dan Odishoo, sr vp-grp mgmt super.

Hidden Valley Ranch, Pine-Sol, Control, Fresh Step, Litter Green, Scoop Fresh, K.C. Masterpiece, Brita, new products: Young & Rubicam, San Francisco. Karen Adams, sr vp-grp dir.

Liquid-plumr, Soft Scrub, Clorox Clean-Up, Combat, Kingsford charcoal, Kingsford charcoal lighter, Kingsford Pro Grill, BBQ Bag, Match light: DDB Needham Worldwide, Chicago. Colby Kerr, sr vp-grp acct dir.

Hispanic adv: Clorox bleach, Clorox 2, Clorox Clean-Up, Formula 409, Soft Scrub, Tilex: Publicidad Siboney, New York. Luis Nasr, exec vp-gm.

Hispanic adv: Hidden Valley Ranch, Combat, Kingsford, Liquid plumr, Control, Fresh Step, Litter Green: Sosa, Bromley, Aguilar & Associates, San Antonio, Texas. Ernest Bromley, pres.

Hidden Valley Ranch-foodservice, Demani Italian prods-foodservice: The Marlin Co., Springfield, Mo. Dennis Marlin, pres.

Intl/foodservice: Scott Advertising, Milwaukee. Charles E. Reynolds, pres.

RANK: 28

Coca-Cola Co.

Atlanta

Ad spending: **$367.4** million

U.S. AD SPENDING ($ in thousands)			
By media	**1991**	**1990**	**% chg**
Magazine	6,800	7,495	-9.3
Sunday magazine	1,193	27	NA
Newspaper	3,952	4,494	-12.1
Outdoor	2,082	1,998	4.2
Network TV	95,236	88,906	7.1
Spot TV	62,136	75,817	-18.0
Syndicated TV	31,913	34,083	-6.4
Cable TV networks	8,088	2,914	177.5
Network radio	0	404	NA
Spot radio	7,357	8,520	-13.6
Measured media	218,755	224,657	-2.6
Unmeasured	148,600	152,700	-2.7
Total	367,355	377,357	-2.7

Industry's first family

Heinz's David W. Sculley, president-coo, is third of three "corporate" brothers after John, chairman-ceo, Apple Computer, and Arthur, managing director of Morgan Guaranty Trust Co.

By top brands	1991	1990	% chg
Coca-Cola beverages	81,795	90,474	-9.6
Diet Coke beverage	68,110	69,173	-1.5
Sprite beverages	27,348	23,414	16.8
Minute Maid multiproduct	12,792	6,892	85.6
Minute Maid beverage	6,693	11,951	-44.0
Diet Sprite beverage	5,871	7,625	-23.0
Hi-C drinks	5,025	5,693	-11.7

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	11,572	10,236	13.0
Earnings	1,618	1,382	17.1
U.S.	**1991**	**1990**	**% chg**
Sales	4,125	3,931	4.9
Operating income	560	440	27.3
Division sales	**1991**	**1990**	**% chg**
Soft drinks, domestic	2,645	2,461	7.5
Soft drinks, int'l	7,245	6,125	18.3
Foods	1,636	1,604	2.0

CORPORATE PROFILE

Coca-Cola Co. is expected to change its campaigns for both Coca-Cola Classic and Diet Coke as it struggles to boost U.S. volume levels of its mammoth brands.

The cola giant is also getting more active in "alternative" beverages, with expansion of PowerAde isotonic drink and introduction of Nestea iced tea in a joint venture with Nestle. The Nestle/Coca-Cola venture also markets canned iced coffee overseas, which it may eventually bring to the U.S. The company also is exploring a clear cola and a line of Nordic Mist fruit-flavor beverages.

Coca-Cola's relationship with Hollywood's powerful Creative Artists Agency continued as CAA took an even more active role in developing advertising for Coca-Cola Classic. CAA was said to be working side-by-side with McCann-Erickson Worldwide, New York, developing storyboards and writing ad lines. CAA was retained in 1991 as a global media and communications consultancy.

This year, Coca-Cola began rolling out the repackaged new Coke, called Coke II, into 20% of the country. Diet Coke, the nation's No. 2 soft drink, is expected to get a new campaign within the next few months that will replace its decade-old "Just for the taste of it" tag.

Since its introduction in 1982, Diet Coke has been the envy of the industry with consistent sales and share gains. But in 1991, share was stagnant at 9.3% of the $47 billion retail soft-drink market, according to Beverage Digest. For the 52 weeks ended May 15, Diet Coke supermarket sales declined 0.7%, forcing 0.3 point off the brand to a 7.5% share in that retail sector.

Flagship Coca-Cola Classic, the leading U.S. soft drink, maintained its 20% share of market in 1991, against rival Pepsi-Cola's 18.4% share. Still, Coca-Cola faces stiff price wars and a sluggish market, especially for colas.

Sprite, the leading lemon-lime beverage, continues its growth trend. Sprite grew 8.7% in sales to a 2.6% share of total market during the 52 weeks ended May 15. Its gain came at the expense of 7UP, whose share dropped to 2.9% from 3.1% in the prior year.

Ad spending tracked share performance. Spending for both Classic and Diet Coke declined slightly in 1991 to $58 million, down 4%, and $62 million, down 3%, respectively. Spending for Sprite jumped 19% to $27 million, noted LNA/Arbitron Multi-Media Service.

Sales of Coca-Cola Foods' Minute Maid refrigerated orange juice in the 52 weeks ended March 14 declined 1.5% to $421 million of the $1.9 billion market, ranking it No. 2, while Seagram Co.'s No. 1 Tropicana picked up the slack, gaining 1.4% to $622.8 million, according to Nielsen Marketing Research.

Despite slow growth trends in the U.S., Coca-Cola once again turned in a stellar performance thanks to its fast-growing international operations. More than 60% of its net operating revenue, and some 75% of its operating income, comes from outside the U.S.

HEADQUARTERS

Coca-Cola Co./One Coca-Cola Plaza N.W./Atlanta, Ga. 30313/Drawer 1734/Atlanta, Ga. 30301/Phone: (404) 676-2121.

PERSONNEL, BRANDS, AGENCIES

COCA-COLA USA: One Coca-Cola Plaza N.W./Atlanta, Ga. 30313/Drawer 1734/Atlanta, Ga. 30301/Phone: (404) 676-2121. M. Douglas Ivester, pres, Coca-Cola USA/sr vp, Coca-Cola Co.; Pierre U. Ferrari, sr vp-mktg; Daniel H. Sayer, dir-Coca-Cola trademark brands; Steven Horn dir-citrus brands; Christopher J. Gagen, dir-media.

Black adv: Burrell Advertising, Chicago. Tom Burrell, pres.

Hispanic adv: Sosa, Bromley, Aguilar & Associates, San Antonio. Lionel Sosa, pres.

Sprite, diet Sprite, Mr. Pibb, Fanta domestic, Minute Maid orange soda, Fresca, Mello Yello: Lowe & Partners, New York. Joan Overlock, exec vp-acct mgmt.

Coca-Cola Classic, caffeine-free Coca-Cola Classic, Fanta intl, cherry Coke, diet cherry Coke: McCann-Erickson Worldwide, New York. John Dooner, pres-North America.

Diet Coke, caffeine-free Diet Coke: Lintas:New York. Steve Norcia, grp exec vp, domestic; Robert Wadsworth, exec vp-intl.

COCA-COLA FOODS: 2000 St. James Place/Houston, Texas 77056/P.O. Box 2079/Houston, Texas 77252/Phone: (713) 888-5000. John Weslar, vp-mktg; Richard M. Helmey, sr vp-foodservice.

Lowe & Partners, N.Y. Jeff Tarakajian, sr vp-mgmt super; Sammy Smith, sr vp-mgmt super.

Hi-C, Bacardi tropical fruit mixers: Lowe & Partners, New York. Erica Mann, vp-mgmt super.

Minute Maid Orange Juice, 5 Alive: Lowe & Partners, New York. Don Amira, vp-mgmt super.

RANK: 42

Colgate-Palmolive Co.

New York

Ad spending: **$227.5** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	9,330	7,415	25.8
Sunday magazine	527	85	523.0
Newspaper	979	3,064	-68.1
Outdoor	961	1,429	-32.8
Network TV	34,350	45,097	-23.8
Spot TV	11,147	13,014	-14.3
Syndicated TV	7,382	9,766	-24.4
Cable TV networks	2,678	4,402	-39.2
Network radio	544	2,651	-79.5
Spot radio	2,472	1,910	29.4
Measured media	70,369	88,832	-20.8
Unmeasured	157,100	198,400	-20.8
Total	227,469	287,232	-20.8
By top brands	**1991**	**1990**	**% chg**
Colgate toothpaste, toothbrushes	28,386	41,211	-31.1
Irish Spring soap	9,027	7,200	25.4
Palmolive dishwashing soaps	7,957	13,290	-40.1
Murphy oil soap	5,999	6,865	-12.6

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	6,061	5,691	6.5
Earnings	125	321	-61.1
U.S.	**1991**	**1990**	**% chg**
Sales	2,196	2,059	6.7
Operating profit	99	217	-54.6
Division sales	**1991**	**1990**	**% chg**
Household, personal care	5,261	4,968	5.9
Specialty marketing	800	723	10.6

CORPORATE PROFILE

Colgate-Palmolive Co. is pumping out a host of new toothpaste and detergent products and line extensions this year, but the big boon to the company's competitiveness came in March with the acquisition of Mennen Co.

The purchase of Mennen, a company with sales of more than $550 million, is viewed as Colgate's ticket to more effectively competing with personal products giants Procter & Gamble Co. and Unilever. From its $670 million acquisition, Colgate picked up Mennen Speed Stick, Mennen Lady and Mennen Teen Stick deodorant lines, which together represent 16.2% of the market valued at $1.14 billion retail, according to Towne-Oller & Associates.

Both new-product activity and the Mennen buyout helped push second-quarter sales up 19% to $1.8 billion and net income up 33% to $124.4 million. Unit growth advanced 14% across all brand lines, half of that coming from Mennen.

During 1991, Colgate's overall unit volume grew 5% worldwide, with 2 percentage points coming from acquisitions. The company bought Murphy oil soap and the international rights to Plax anti-plaque mouthwash from Pfizer.

North American sales were up 25% in the second quarter, largely from added Mennen business but also from new-product introductions, including Colgate baking soda toothpaste, part of a Colgate franchise that currently holds 24.4% of the $1.1 billion market for dentifrices, second to P&G's 33.2%, according to Towne-Oller & Associates.

Earlier, the company introduced Precision toothpaste, and Fab Ultra and Ajax Ultra superconcentrate detergents, and it broadened distribution of Irish Spring deodorant.

Results of Colgate's Specialty Marketing segment, in which Hill's Science Diet pet food is the major participant, flattened out in second quarter 1992 as sales advanced only 3.8% worldwide vs. 11% in all of 1991. Hill's Pet Products, however, showed volume gains of 8% in the quarter, the same as in all of 1991.

HEADQUARTERS

Colgate-Palmolive Co./300 Park Ave./New York, N.Y. 10022-7499/Phone: (212) 310-2000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Reuben Mark, chmn-pres-ceo; William S. Shanahan, sr exec vp-coo; Lois D. Juliber, chief tech officer; John E. Steel, sr vp-global bus devel; Brian F. Bergin, pres-Colgate, Europe; Craig B. Tate, pres-Colgate, Far East/Canada; David A. Metzler, pres-Colgate, Latin America; Michael S. Roskothen, exec vp-commercial operations, Colgate-Europe; Edgar J. Field, pres-intl bus devel; Michael L. Hoye, vp-global acquisition integration; Emilio Alvarez-Recio, vp-global adv; Robert Murray, vp-corp comms; Ariel Allen, vp-creative svcs; Cyrill R. Siewert, pres-Colgate oral care, professional div; Kathleen Thornhill, vp-oral care, global bus devel; John Tietjen, vp-household surface care, global bus devel; Thomas G. Davies, vp-global bus devel, fabric care; Douglas R. Wright, vp-environmental affairs.

Colgate US: Edward T. Fogarty, pres; Stephen J. Fogarty, exec vp-mktg/effective mktg; David L. Enfiled, vp-mktg and sales effectiveness; W. Bruce Johnson, vp-info svcs; Nigel B. Burton, vp-oral care; Suzan Harrison, vp-household surface care; Donald R. Kitchen, vp-fabric care; Robert E. Blanchard, vp-environmental affairs; Christian A. Nast, vp-sales; Grace E. Richardson, vp-consumer affairs; Greg Andrews, gm-mktg devel; Herney Nisimblat, mgr-Hispanic mktg.

Colgate dental cream, Colgate Tartar Control toothpaste & mouthwash, Colgate Jr. toothpaste, Colgate Baking Soda toothpaste, Irish Spring soap, Irish Spring antiperspirant, Colgate toothbrushes, Fluorigard mouthwash, Colgate shave prep: Young & Rubicam, New York. Tim Pollak, pres-vice chmn Wunderman Worldwide client svcs; Avi Dan, sr vp-grp dir U.S.

Palmolive dishwashing liquid, Palmolive Automatic liquid for dishwashers, Dynamo detergents, Ajax dishwashing liquid, Fab Ultra detergent, Ultra Ajax detergent, Fresh Start detergent, Palmolive soap, Ultra Brite toothpaste: FCB/Leber Katz Partners, New York. Ned Wiley, exec vp-worldwide dir; Mel Sokotch, sr vp-grp mgmt dir, U.S.

Hispanic adv: Siboney Advertising, New York. Gustavo Foldvari, gm.

HILL'S PET PRODUCTS: 400 W. 8th St./Topeka, Kan. 66603/Phone: (913) 354-8523. Robert C. Wheeler, pres-ceo; Richard F. Hawkins, pres-intl; James Humphrey, vp-vet mktg; Dr. Larry Hawk, dir-mktg dietary mgmt; Ted R. Freese, dir-pet mktg; Jan Karnes, grp mktg mgr.

Prescription Diet/Science Diet: Harmon Smith Advertising, Kansas City, Mo. Scott Johnson, vp-client svcs, vet mktg.

Science Diet: Y&R/Wunderman Worldwide, Detroit. Chuck Riley, exec vp-dir client svcs.

MENNEN CO.: Hanover Ave./Morristown, N.J. 07962-1928/Phone: (201) 631-9000 George Fellows, pres; Virginia Dotzauer, vp-mktg.

Speed Stick antiperspirant and deodorant, Lady Speed Stick deodorant: McCann-Erickson Worldwide, New York. Carol Smith.

Baby Magic, Skin Bracer, new products: Lowe & Partners, New York. Jeff Tarakajian, mgmt dir.

MURPHY-PHOENIX CO.: 300 Park Ave./New York, N.Y. 10022/Phone: (212) 310-2000. Robert Holland, dir-mktg all products. Genova Hartwick Juliano, Greenwich, Conn. Phil Juliano, pres.

SOFTSOAP ENTERPRISES: 1107 Hazeltine Blvd./Chaska, Minn. 55318/Phone: (612) 448-1700. Larry J. Wilhelm, pres; Steve Elliot, vp-mktg all products. Martin/Williams, Minneapolis, Minn. Joseph Rabaglia, mgmt super.

PRINCESS HOUSE: 455 Somerset Ave./North Dighton, Mass. 02754/Phone: (508) 823-0713. Stephen K. Zrike, pres-ceo; William O. Porteous, vp-field sales devel; Elizabeth A. Bowes, vp-incentive mktg.

Princess House home decorative and gifts: Saabye & Co., Providence, R.I. Cathy Ottaviano, exec vp.

COLGATE-PALMOLIVE INSTITUTIONAL PRODUCTS: 101 N. Summit St./Tenafly, N.J. 07670/Phone: (201) 568-2330. Kenneth E. Snyder, pres-ceo; Gary Ponder, vp-sales; Frank Drosselmeier, mktg mgr-soap/cleansers/new prods; Edward R. Gagliardi, dir-mktg.

RANK: 40

ConAgra

Omaha

Ad spending: **$249.7** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	19,424	16,303	19.1
Sunday magazine	567	1,109	-48.9
Newspaper	1,946	1,801	8.1
Outdoor	234	56	319.6
Network TV	49,338	41,823	18.0
Spot TV	27,790	36,353	-23.6
Syndicated TV	5,370	4,422	21.4
Cable TV networks	3,279	2,910	12.7
Spot radio	3,997	5,763	-30.6
Measured media	111,944	110,539	1.3
Unmeasured	137,800	136,100	1.2
Total	249,744	246,639	1.3
By top brands	**1991**	**1990**	**% chg**
Healthy Choice frozen meals	22,415	25,934	-13.6
Orville Redenbacher snacks	15,006	18,125	-17.2
Hunt's sauces	10,161	9,222	10.2
Swift meats	10,105	9,302	8.6
Wesson oils	8,775	8,334	5.3
Peter Pan peanut butter	6,183	8,030	-23.0
Country Pride meats	5,906	6,815	-13.3

SALES & EARNINGS ($ in millions)

Worldwide	1992	1991	% chg
Sales	21,219	20,177	5.2
Earnings	372	332	12.2
Division sales	**1992**	**1991**	**% chg**
Prepared foods	16,201	15,760	2.8
Agri-products	2,736	2,444	11.9
Trading & processing	2,282	1,973	15.6

CORPORATE PROFILE

Healthy Choice has taken the nation's supermarkets by storm. The 3-year-old line was expanded to 150 items, with brand sales rising to about $500 million, up 52% from fiscal 1991.

The Healthy Choice line now includes frozen dinners, entrees and breakfasts, an egg substitute, ground beef, canned soups, spaghetti sauces, ice cream, lunch meats, hot dogs and cheeses. The foods offer reduced calorie, cholesterol, fat and sodium levels.

ConAgra projected Healthy Choice will become a $1 billion retail brand during the current fiscal year.

This fall, Beatrice Cheese Co. is introducing a 30-item line of Healthy Choice fat-free cheeses, expected to strike at the heart of Kraft's $2 billion cheese franchise. The introductory campaign falls under Healthy Choice's "The choice is yours" umbrella campaign, and is expected to push total Healthy Choice marketing spending to more than $100 million this year.

ConAgra launched its 29-item Healthy Choice lunch meat/hot dog line in February. Healthy Choice, along with competitors Oscar Mayer Foods Corp.'s Healthy Favorites, Weight Watchers Foods Co. and Sara Lee Corp.'s Hillshire Farms, is trying to slice out a new light segment of the combined $4 billion market for lunch meats and hog dogs.

ConAgra's Armour Swift-Eckrich meat company's deli division also began marketing eight varieties of the lean meats for supermarket service delicatessens.

In January, ConAgra's Hunt-Wesson rolled out the Healthy Choice line of spaghetti sauces, available in five varieties. The company backed the launch with $10 million in marketing support.

ConAgra, the nation's No. 2 beef marketer, unveiled the 96% fat-free Healthy Choice extra-lean ground beef last fall, and a Healthy Choice line of frozen seafood.

Although Healthy Choice has been hailed as the most successful newcomer to the supermarket freezer case since Lean Cuisine from Stouffer Foods Corp. in 1981, the brand has triggered a price war that's proved costly to ConAgra and its frozen food competitors. According to some industry estimates, frozen food prices now are 30% lower than last year's.

As a result, Healthy Choice frozen foods and entrees are losing market share, and the company is barely breaking even on the brand. Healthy Choice, with a market share of 10.2%, ranks second to Stouffer in the frozen dinners and entree market valued at $3.4 billion, according to Nielsen Market Research data for the year ended April 18. Its share was down 0.3 point from the previous year.

Hunt-Wesson's Wesson brand led the salads and cooking oils market with a 20.1% share for the 52 weeks ended June 27, up from 19.5% in the previous year. The Healthy Choice brand ranked No. 6, with 1.8% of the $2.1 billion ready-to-serve soup market for the 52 weeks ended May 23, according to Nielsen.

HEADQUARTERS

ConAgra Inc./One ConAgra Drive/Omaha, Neb. 68102/Phone: (402) 595-4000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: L. James Kennedy, vp-corp dir-mktg.

CONAGRA FROZEN FOODS: Five ConAgra Drive/Omaha, Neb. 68102/Phone: (402) 595-6000. Jim Tindall, pres; Stephen Hughes, exec vp-nutritional foods; Steve Van Tassel, vp-mktg, strategic brands; David Lunghino, vp-adv, Banquet brands; Nancy Matthews, dir-consumer promo/adv.

Healthy Choice: Campbell-Mithun-Esty, Minneapolis. Madeline Betsch, exec vp-dir, acct svcs; Roxanne Goertz, vp-mgmt super.

Banquet, Healthy Balance, Kid Cuisine, Slim-Fast: Grey Advertising, New York. C. Jeffrey Stein, exec vp; Joe Celia, sr vp.

BEATRICE CHEESE CO.: 770 N. Springdale Road/Waukesha, Wis. 53186/Phone: (414) 782-2750. Robert Burns, pres; Jack Hallenbeck, sr vp-mktg/sales.

County Line, Reddi-Wip Dessert Topping, Marzo: William Eisner & Associates, Milwaukee. William Eisner Jr., pres; Wyn Becker, sr vp-client svcs.

Healthy Choice: Campbell-Mithun-Esty, Minneapolis. Madeline Betsch, exec vp-dir, acct svcs; Roxanne Goertz, vp-mgmt super.

CONAGRA PET PRODUCTS CO.: One Central Park Plaza, Suite 700/Omaha, Neb. 68102/Phone: (402) 595-4000. Patrick K. Stewart, pres; Roger Waters, vp-mktg.

Pet products: Smith, Kaplan, Allen & Reynolds, Omaha, Neb. Ronald Kaplan, sr exec vp.

HUNT-WESSON: 1645 West Valencia Dr./Fullerton, Calif. 92633/Phone: (714) 680-1000. Albert J. Crosson, pres; Edward A. Snell, pres-Hunt Foods; Vincent N. Campolongo, pres-Wesson/Peter Pan Foods; Claude L. Jones, pres-La Choy/Rosarita Foods; David J. Gustin, pres-Orville Redenbacher/Swiss Miss Foods.

Hunt's, Wesson, La Choy, Peter Pan, Manwich, Orville Redenbacher's, Rosarita: Ketchum Advertising, San Francisco. John Faville, sr vp-dir, acct svcs; Dexter Fedor, sr vp-creative dir; Kristi Argylian, vp-assoc media dir.

Healthy Choice: Campbell-Mithun-Esty, Minneapolis. Madeleine Betsch, exec vp-dir, acct svcs; Roxanne Goertz, vp-mgmt super.

ARMOUR SWIFT-ECKRICH: 2001 Butterfield Road/Downers Grove, Ill. 60515/Phone: (708) 512-1000. John D. Likovich, pres-Armour; Michael Rozzano, exec vp-genl mgr, Armour; Marty Butler, dir-mktg, Armour; Thomas E. Howe, pres, Butterball; D. Hull, dir-mktg, Butterball; Gregg A. Ostrander, pres, Swift Eckrich Prepared Foods; Randy Irion, dir-mktg svcs/rsch, Swift-Eckrich; Sharon McLenahan, grp mktg mgr, Eckrich; Tim Harris, vp-genl mgr, Healthy Choice; Bill Klump, vp-genl mgr, Swift consumer prods; Mike Fisher, genl mgr, Eckrich.

Butterball, Swift, Eckrich: Grey Advertising, New York. C. Jeffrey Stein, exec vp; Michael Gaertner, sr vp.

Armour, Armour frozen foods: Puskar Gibbon Chapin, Dallas. Jim Gibbon, principal.

Healthy Choice: Campbell-Mithun-Esty, Minneapolis. Madeleine Betsch, exec vp-dir, acct svcs; Roxanne Goertz, vp-mgmt super.

CONAGRA POULTRY CO.: 422 North Washington/Eldorado, Ark. 71730/Phone: (501) 863-1600. George R. Haefner, pres-coo; Larry Hogrefe, vp-dir, mktg.

Country Pride: Campbell-Mithun-Esty, Minneapolis. Madeleine Betsch, exec vp-dir, acct svcs; Roxanne Goertz, vp-mgmt super; Anne Bologna, acct super.

GOLDEN VALLEY/LAMB-WESTON: 7450 Metro Blvd./Edina, Minn. 55439/Phone: (612) 835-6900. James D. Watkins, pres-coo; John Watson, exec vp-mktg; John Bauer, vp-mktg.

Golden Valley: Martin Williams, Minneapolis. Dave Horen, chmn-ceo; Tom Weyl, pres-chief creative officer; Joe Arbaglia, mgmt super.

RANK: 52

Adolph Coors Co.

Golden, Colo.

Ad spending: **$206.9** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	3,336	3,861	-13.6
Sunday magazine	261	148	75.7
Newspaper	743	441	68.4
Outdoor	3,174	3,048	4.1
Network TV	51,689	37,305	38.6
Spot TV	53,693	53,687	0.0
Syndicated TV	9,873	14,581	-32.3
Cable TV networks	3,217	2,823	14.0
Spot radio	4,343	6,743	-35.6
Measured media	130,329	122,636	6.3
Unmeasured	76,600	72,100	6.2
Total	206,929	194,736	6.3
By top brands	**1991**	**1990**	**% chg**
Coors beer	106,673	104,485	2.1
Keystone beer	21,014	11,844	77.4

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	1,917	1,839	4.3
Earnings	26	39	-34.4
Division sales	**1991**	**1990**	**% chg**
Beer	1,530	1,477	3.6
Ceramics	180	180	0.2
Aluminum	96	113	-15.4
Packaging	188	156	20.8
Developmental	111	106	5.5

CORPORATE PROFILE

Adolph Coors Co. entered 1992 with two big decisions to make: whether to divest itself of non-brewing assets and how to extend its success beyond Coors Light.

In the face of its growth into the nation's No. 3 brewer, Coors moved to spin off its non-brewing assets, including its packaging and energy-related businesses, to concentrate on the brewing subsidiary. Coors Brewing Co. produces nearly 73% of revenues and is in an increasingly bruising battle with rivals Anheuser-Busch and Miller Brewing Co.

While the brewing industry saw shipments drop 2.2%, Coors was the only major brewer to see its barrelage grow, up 0.8%. Coors' share of the brewing industry rose to 10%, from 9.7% in 1990.

Coors Light saw barrelage grow 4.9%, to 12.4 million barrels, to rival Bud Light as the nation's No. 3 brew. Some of the gain was offset by a nearly 15% loss in volume for original Coors. Coors' subpremium-price Keystone brand, introduced in 1990, grew 4%, mostly attributable to Keystone Light.

The continued growth of Coors Light has been bolstered by a variety of new national and local promotions, including the first use of a "talking can" sweepstakes by any major beverage company.

Coors in 1990 and 1991 also introduced Keystone Dry and Coors Dry in a number of markets; rolled out its Cutter non-alcoholic beer; and began distributing import Moussy non-alcoholic beer.

Coors Light's growth attracted some unwanted competitive attention from Anheuser-Busch, which this summer broke with past corporate policies to run a blatantly anti-Coors Light ad in the Northeast contesting Coors' historic use of Rocky Mountain imagery.

The growth also raised internal questions, since Coors Light grew to 63% (up from 60%) of the brewing arm's total business. Some of the answers may come from the former Stroh Brewery Co. brewery in Memphis, Tenn., that Coors bought in 1990 and opened last year initially as a packaging plant. Coors began production there this year with Zima, a clear, malt-flavor beverage now in test. The company is expected to announce a range of products for the plant in the next few months or move production of the Keystone beers and perhaps Cutter there.

The cost of refitting the plant, together with price pressures and production problems, gave Coors a less pleasing year on profits. Net income dropped by a third, and the pressures prompted some layoffs and cost-cutting.

Coors entered Indiana in 1991, giving it distribution in all states.

HEADQUARTERS

Adolph Coors Co./311 10th St./Golden, Colo. 80401/Phone: (303) 279-6565.

PERSONNEL, BRANDS, AGENCIES

COORS BREWING CO.: 12th & Ford/Golden, Colo. 80401/Phone: (303) 279-6565. Bob Rechholtz, exec vp-mktg; Robert Klugman, vp-brand mktg; Michael Marranzino, vp-devel/intl; Richard E. Franklin, vp-field mktg; Bob McBride, brand dir-Coors Light; Craig Guthrie, brand dir-Keystone/Keystone Light/Keystone Dry; Mark Stankovic, dir-intl mktg; Gary Skovsted, brand mgr-Coors Extra Gold; Vinnie Prattico, internal mktg mgr-U.S. specialty imports (Killians, Winterfest, Moussy); George Mansfield, mgr-intl; Steve Ritter, brand dir-Coors; Jon Runge, brand mgr-Coors Dry; Tim Owston, brand mgr-Cutter; George Mahrlig, dir-media/event mktg; John Ney, brand mgr, Zima.

Coors Light, Coors Extra Gold, Keystone brands, Killian's Red; Moussy: Foote, Cone & Belding, Chicago. Dan Fox, exec vp-grp acct dir.

Original Coors, Coors Dry, Hispanic mktg & comnty rel, Coors Light (Texas): GSD&M, Austin, Texas. Chuck Grady, sr vp-acct dir, Original Coors, Hispanic, Coors Light; Robert Miller, sr vp-acct dir, Coors Dry, community relations.

Corporate, community relations/women, literacy: Evans/Denver. Mark Voss, vp-acct svcs.

African-American markets: Uniworld Group, New York. Mark Robinson, vp-grp adv dir.

African-American Coors Extra Gold: Vince Cullers Advertising, Chicago. Jeffrey Cullers, vp-grp dir.

Cutter: Tatham/RSCG, Chicago. Robert Hielscher, mg partner.

Zima Clearmalt: Foote, Cone & Belding, San Francisco. Bob Ravasio, vp-mgmt super.

Trade advertising: Goldberg Moser O'Neill, San Francisco. Josh Nichol, sr vp-dir acct mgmt.

RANK: 75

CPC International

Englewood Cliffs, N.J.
Ad spending: **$131.4** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	3,604	3,490	3.3
Newspaper	47	72	-34.9
Outdoor	0	58	NA
Network TV	24,525	26,283	-6.7
Spot TV	10,689	18,209	-41.3
Cable TV networks	402	1,733	-76.8
Spot radio	144	387	-62.9
Measured media	39,410	50,231	-21.5
Unmeasured	92,000	86,800	6.0
Total	131,410	137,031	-4.1
By top brands	**1991**	**1990**	**% chg**
Hellmann's mayonnaise	13,118	15,393	-14.3
Skippy peanut butter	7,116	8,415	-15.4
Thomas bakery prods	6,599	8,607	-23.3

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	6,189	5,781	7.1
Earnings	373	374	-0.3
U.S.	**1991**	**1990**	**% chg**
Sales	2,309	2,322	-0.6
Operating income	325	336	-3.2
Division sales	**1991**	**1990**	**% chg**
Consumer foods	5,118	4,695	9.0
Corn refining	1,071	1,087	-1.4

CORPORATE PROFILE

CPC International showed respectable growth worldwide in 1991, but not in the U.S., where low volume pushed sales 0.6% below year-earlier levels; operating income dropped by 3.2%.

Consumer foods, accounting for 80% of CPC's worldwide revenues, performed poorly in the U.S., where the segment eked out 1% sales growth.

Part of the company's strategy in rebuilding U.S. sales lies in stimulating ad spending and tapping the growing population segments such as Hispanics.

Best Foods President Robert Gillespie said his division is hiking ad spending this year, although downward revisions in spending might occur if profits can't sustain the spending increases. Virtually all of CPC's $39.4 million spent in media in 1991, down 21.5%, was on Best Foods products, according to LNA/Arbitron Multi-Media Service.

Skippy's tough '91 has continued into '92. This May, the U.S.' No. 2 peanut butter saw sales slip 4.6% and share drop to 20.1% from 21.6% in the previous May, according to Nielsen Marketing Research. U.S. sales in 1991 fell 4%. The leaders in the category got pinched by a near doubling in peanut prices in '91.

This year, potential challenges are coming from new competitors—Reese's peanut butter from Hershey Foods Corp. and no-salt Simply Jif from Procter & Gamble Co. Observers expected Reese's entry to spark an ad spending war by the big players.

In mayonnaise, CPC has almost half the U.S. market with the Hellmann's and Best Foods brands, even though its North American mayonnaise volume dropped 1% last year. Hellmann's ended the year with the category's top market share of 24.6%, a half a share point ahead of Kraft General Foods' Miracle Whip. Best Foods' share was 12.4%, according to Information Resources Inc.'s InfoScan.

CPC had better results with the Knorr line of sauces, soups and bouillons; North American sales of these Knorr categories climbed 11%. Media spending rose 73% to $3.5 million for Knorr.

The Hispanic market also is a growth area for Mazola corn oil. Volume rose 2% in '91, though market share slipped.

Measured media for Thomas' English muffins fell 23.7% to $6.6 million last year.

HEADQUARTERS

CPC International/International Plaza/Englewood Cliffs, N.J. 07632/Phone: (201) 894-4000.

PERSONNEL, BRANDS, AGENCIES

BEST FOODS DIV: International Plaza/Englewood Cliffs, N.J. 07632/Phone: (201) 894-4000. John Moorhead, vp-mktg svcs; Stanley M. Hakmiller, vp-sales; Joan S. Dargery, vp-new bus devel; Robert T. Viscardi, media dir.

Hellmann's/Best Foods mayonnaise, Skippy peanut butter, Hellmann's/Best Foods Dijonnaise mustard, Mueller's Super Shapes dry pasta products, select new products, network TV media buying: BBDO Worldwide, New York. Anthony R. Brescia, sr vp-acct dir.

Thomas' English muffins, Karo syrup, Mazola products, new products, spot TV buying: Backer Spielvogel Bates Worldwide, New York. Alan Kellam, mgmt super.

Hispanic adv-Mazola corn oil: Bravo Group, New York. Daisy Esposito, pres-chief creative officer.

Niagara spray starch, new products: Campbell-Mithun-Esty, New York. Charlie Lehman, mgmt super.

Hispanic adv-Hellmann's/Best Foods mayonnaise: Conill Advertising, New York. Sue Bittencourt, vp.

Arnold Bakery light line, Arnold Bran'nola bread, Brownberry breads: Rotando Lerch & Iafeliece, Stamford, Conn.

CPC FOODSERVICE: International Plaza/P.O. Box 8000/Englewood Cliffs, N.J. 07632/Phone: (201)894-4000. Robert J. Nemec, vp-mktg/sales.

KNORR SPECIAL PRODUCTS: International Plaza/P.O. Box 8000/Englewood Cliffs, N.J. 07632/Phone: (201) 894-4000. Robert Allin, vp-mktg dir.

Knorr soups, Knorr sauces, Knorr liquid sauces, Knorr bouillons: Warwick Baker & Fiore, New York. Andy Mochler, vp-mgmt super.

BEST FOODS BAKING GROUP: 100 Passaic Ave./Fairfield, N.J. 07004/Phone: (201) 808-3000. Donald Berman, vp-bus mgmt.

RANK: 88

Daimler-Benz AG

Stuttgart, Germany
Ad spending: **$122.2** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	16,610	18,293	-9.2
Sunday magazine	175	541	-67.7
Newspaper	27,867	21,616	28.9
Outdoor	746	163	359.1
Network TV	27,743	30,536	-9.1
Spot TV	8,779	12,280	-28.5
Syndicated TV	140	0	NA
Cable TV networks	2,190	1,655	32.4
Spot radio	6,330	7,331	-13.7
Measured media	90,581	92,413	-2.0
Unmeasured	31,600	32,300	-2.2
Total	122,181	124,713	-2.0
By top brands	**1991**	**1990**	**% chg**
Mercedes-Benz cars	88,901	88,381	0.6

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	59,750	NA	NA
Earnings	3,100	3,100	0.0

CORPORATE PROFILE

Daimler-Benz, Germany's biggest industrial group, early this year switched ad agencies working on its Mercedes-Benz of North America account in an attempt to reverse declining sales.

There was a lot at stake: Two-thirds of Daimler-Benz's business in 1991 came from its luxury car and truck division, Mercedes-Benz. The recession and new competition, especially from the Japanese, cut Mercedes' U.S. unit sales to 58,868 cars, down 24.9% from the previous year.

The national account, valued at $130 million, was awarded to Scali, McCabe, Sloves, New York. Regional dealer support was given to Scali's 85%-owned Martin Agency, Richmond, Va.

Initial advertising for Mercedes by its new agencies introduced a new tone and style, portraying a 36-month leasing program in a whimsical way. The change is intended to make the costly German cars seem "more approachable," said Michael J. Jackson, Daimler-Benz exec VP.

By midyear 1992, sales had rebounded, improving to 39,593 cars, up 19.3% from the same period a year earlier.

The company offered 18 models during 1992, ranging from the 190 sports sedan series to the 300SL/500SL coupe/roadster. The company holds about 0.8% of the U.S. automobile market.

HEADQUARTERS

Daimler-Benz AG/BPA/Postfach 60 02 02/7000 Stuttgart 60/Germany.
Mercedes-Benz of North America/One Mercedes Drive/Montvale, N.J. 07645-0350/Phone: (201) 573-0600.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Michael J. Jackson, exec vp; Albert Weiss, gm-mktg comms; Kevin Davidson, mgr-adv.

Mercedes-Benz: Scali, McCabe, Sloves (natl image adv), New York. Marvin Sloves, chmn; Philippe H. Defechereux, exec vp-grp acct dir.

The Martin Agency (dealer support adv), Richmond, Va. John Adams, pres.

RANK: 43

Dayton Hudson Corp.

Minneapolis
Ad spending: **$226.5** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	1,916	2,586	-25.9
Sunday magazine	46	3,555	-98.7
Newspaper	46,004	106,158	-56.7
Outdoor	956	88	983.0
Network TV	444	291	52.5
Spot TV	52,479	48,957	7.2

SAVE TIME
SAVE MONEY
AISLE 6
Specials
Coupons
Nabisco Wheat Thins 10 oz. Box, ~~$2.29~~...Now $1.98
Campbell's Chicken Soup 10.25 oz. Can, ~~59¢~~...Now 44¢
Uncle Ben's Rice 16 oz. Box, ~~$1.59~~...Now $1.19
La Choy Choy Mein 14 oz. Can, ~~$1.62~~...Now $1.39
Help
Cheetos Cheese Snacks 8 oz. Bag 30¢ OFF
Ocean Spray Juice 32 oz. Bottle 60¢ OFF
Tostitos Tortilla Chips 10.5 oz. Bag 30¢ OFF
Diet Pepsi 2 Liter Bottle 50¢ OFF
Exit
VideOcart

Finders,

☐ Your product is preferred. Your facings are fabulous. Your tagline is burned into our brains. Your price point is perfect. And right now, you're on promotion. Still no cigar. Why? Because you're one of more than 500 SKUs on one side of one aisle in the supermarket. And if the person you have so carefully pre-sold and reminded and maneuvered to the point-of-sale can't find your product—then nothing else matters. You're history. ☐ That's the problem. BULL'S-EYE is the solution. *BULL'S-EYE is a VideOcart® screen that shows the shopper exactly where to find your product on the shelf ahead.*

By media	1991	1990	% chg
Cable TV networks	14	55	-74.7
Spot radio	6,833	6,157	11.0
Measured media	108,693	167,847	-35.2
Unmeasured	117,800	151,200	-22.1
Total	226,493	319,047	-29.0
By top brands	**1991**	**1990**	**% chg**
Mervyn's misc. mdse	27,939	21,484	30.0
Target misc. mdse	22,066	26,878	-17.9
Mervyn's apparel	13,727	20,252	-32.2
Target sport, toy & hobby	8,814	7,547	16.8
Target household products	8,585	7,658	12.1
Target apparel	8,520	8,706	-2.1

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	16,115	14,739	9.3
Earnings	301	412	-26.9
Division sales	**1991**	**1990**	**% chg**
Target	9,041	8,175	10.6
Mervyn's	4,143	4,055	2.2
Department stores	2,931	2,509	16.8

CORPORATE PROFILE

Despite the difficult economic climate, Dayton Hudson Corp. in 1991 eked out 2% growth in comparable-store revenues.

After such bare-bones returns, the company has experienced a slight uptick in first half 1992. Same-store growth rose 3%, compared with all-store growth of 11%, to $7.69 billion. The results came on earnings of $77 million, up 4.1% from the year-earlier period.

First-half results were particularly strong at Target Stores, with same-store revenues up 5% and all stores up 16% to $4.46 billion, or 58% of Dayton Hudson's sales. Target, the upscale discounter, had yearend sales growth of 11% for all stores.

Target remains Dayton Hudson's largest advertiser with measured media backing of $52.2 million last year, down 3%, according to LNA/Arbitron Multi-Media Service.

Target expanded operations in Florida, rolled out its Target Greatland superstore format and began a two-store test of Everyday Hero, a specialty apparel concept developed to mimic the look and prices of such chains as The Gap.

Mervyn's, the moderately priced softlines retailer, rose 2% in revenue in 1991 because of new-store expansion as comparable-store sales dropped 1%. Same-store volume has remained flat in first half 1992, up only 1%.

Media spending for Mervyn's fell 9% to $52.2 million in 1991, according to LNA/Arbitron Multi-Media Service.

Mervyn's, whose base market is California, burst upon the southeast Florida retail scene in 1991 with 10 new outlets, rekindling new-store growth activity that had slowed in the late 1980s as Mervyn's came up with a new store prototype. About 60% of the chain's outlets have been remodeled.

The department store division that includes Dayton's, Hudson's and Marshall Field's remained sluggish in the first half of '92, with revenues up 3% from all stores and 2% from comparable stores. Full-year 1991 division sales were up 17%, largely due to the addition of full-year results from newly acquired Marshall Field's.

Media spending by the division declined 81% to $12.9 million, an amount almost equally divided among the three retailers, LNA noted.

Each store in the division handles production and placement of advertising in-house. Much of the advertising continues to tout prices, instead of broader, image campaigns. There are 19 Dayton's, 20 Hudson's and 23 Marshall Field's stores.

HEADQUARTERS

Dayton Hudson Corp./777 Nicollet Mall/Minneapolis, Minn. 55402/Phone (612) 370-6948.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Stewart Widdess, sr vp-mktg; Paul Karmann, dir-media planning; Jack Mugan, dir-creative svcs; Karen Bohnhoff, vp-trend merch/special events.

DAYTON'S, HUDSON'S, DEPARTMENT STORE DIV: 700 on the Mall/Minneapolis, Minn. 55402/Phone: (612) 375-2200.

Dayton's, Hudson's, Marshall Field & Co.: (in-house) Pidgin Productions, Minneapolis. Gary Jensen, pres.

Corporate media buying: Haworth Group, Minneapolis. Dale Haworth, pres.

MERVYN'S: 25001 Industrial Blvd./Hayward, Calif. 94545/Phone (510) 785-8800. Susan Sprunk, vp-sales promo; Pat Holt, dir-adv; Ruth Lindley, dir-consumer rsch/media; Brad Davis, dir-operations/bus planning.

Cohen & Johnson, Los Angeles, Howie Cohen, chmn-creative dir; Mark Johnson, pres.

TARGET STORES: 33 S. 6th St./Minneapolis, Minn. 55402/Phone: (612) 370-6073. John Pellegrene, sr vp-mktg; Robert Thacker, vp-mktg.

Chuck Ruhr Advertising, Minneapolis. Chuck Ruhr, chmn; Louise Scroggins, pres.

RANK: 63

Delta Air Lines

Atlanta

Ad spending: **$164.5** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	10,093	7,336	37.5
Sunday magazine	163	349	-53.2
Newspaper	53,623	32,898	63.0
Outdoor	2,213	1,834	20.7
Network TV	29,802	29,510	1.0
Spot TV	12,194	10,068	21.1
Syndicated TV	0	45	NA
Cable TV networks	2,385	1,848	29.1
Spot radio	12,889	11,086	16.3
Measured media	123,361	94,976	29.9
Unmeasured	41,100	31,700	29.7
Total	164,461	126,676	29.8

SALES & EARNINGS ($ in millions)

Worldwide	1992	1991	% chg
Sales	10,837	9,171	18.2
Earnings	(506)	(324)	NA
Division sales	**1992**	**1991**	**% chg**
Passenger	10,115	8,567	18.1
Cargo	588	476	23.6
Other	134	128	4.4

CORPORATE PROFILE

Like all carriers, Delta Air Lines is caught in a competitive fare war to stimulate leisure travel.

Delta last spring matched American Airlines' new pricing structure—which contributed to the airline's busiest month ever in June, up 25.8% over the same month in 1991. But the yield per revenue miles was down, the company said.

For the 12-month period ending May 1992, Delta ranked third in domestic revenue passenger miles at 15.5%. American Airlines led at 19%, according to the Department of Transportation.

Delta in late July merged the marketing development and planning division with the sales division. Robert Coggin, a senior VP, heads the new marketing division.

HEADQUARTERS

Delta Air Lines/Hartsfield Intl. Airport/Atlanta, Ga. 30320/Phone: (404) 715-2600.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: R.W. Coggin, sr vp-mktg; Harold Achtziger, vp-intl; Al H. Kolakowski, vp-mktg svcs; Marcey McCann, vp-reservations sales; Judy Jordan, asst vp-adv/sales promo; Skip Barnett, dir-field mktg; Matt Guilfoyle, dir-consumer mktg; Harry Dunham, dir-airline, cargo & govt progs; Sandy Rowan, mgr-adv; Don Nabity, staff mgr-adv/promo; Tim Mapes, mgr-intl adv; Jon Proctor, system mgr-promo.

Delta Air Lines: BBDO Worldwide, Atlanta. Jack Walz, exec vp-worldwide acct dir.

Delta Shuttle: Della Femina, McNamee, New York. Ann Milne, mgmt super.

RANK: 23

Walt Disney Co.

Burbank, Calif.

Ad spending: **$489.1** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	27,967	17,752	57.5
Sunday magazine	3,853	613	528.5
Newspaper	23,713	36,912	-35.8
Outdoor	357	688	-48.1
Network TV	93,800	62,919	49.1
Spot TV	71,852	86,241	-16.7
Syndicated TV	26,456	14,595	81.3
Cable TV networks	5,972	4,211	41.8
Network radio	722	1,057	-31.7
Spot radio	2,620	4,461	-41.3
Measured media	257,311	229,448	12.1
Unmeasured	231,800	206,700	12.1
Total	489,111	436,148	12.1
By top brands	**1991**	**1990**	**% chg**
Touchstone films	79,209	80,074	-1.1
Walt Disney World resort	59,512	45,740	30.1
Walt Disney home video	45,940	14,273	221.9
Walt Disney prods. movies	22,712	25,421	-10.7
Hollywood pictures	19,206	20,744	-7.4
Disneyland amusement park	12,505	18,648	-32.9
Disney Channel cable TV	5,908	5,304	11.4

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	6,182	5,844	5.8
Earnings	637	824	-22.7
Division sales	**1991**	**1990**	**% chg**
Theme parks, resorts	3,865	3,020	28.0
Filmed entertainment	2,594	2,250	15.3
Consumer products	724	574	26.2

CORPORATE PROFILE

In the wake of Walt Disney Studios Chairman Jeffrey Katzenberg's infamous 28-page memo imploring Hollywood to rein in runaway production and marketing expenditures, Disney went ahead and boosted ad spending 12% in 1991.

The entertainment giant cut spending slightly for its core feature film division, directly overseen by Mr. Katzenberg. But Disney spent heavily to build its lucrative ancillary businesses, like home video.

Disney's Buena Vista Home Video, backed with a 145% increase in media spending, last year sprinted to an estimated 30% share of the $3.7 billion video "sell-through" business, far ahead of any other marketer. It spent $49.5 million to promote blockbuster titles such as "Fantasia" and "101 Dalmatians," according to LNA/Arbitron Multi-Media Service.

Sales of "Beauty & the Beast," to be released on video Oct. 30, are expected to eclipse the 14 million copies sold last year by "Fantasia." Released last holiday season, "Beauty" set a company record for an animated feature by taking in $142 million.

Licensed merchandise based on "Beauty & the Beast," "The Little Mermaid" and "101 Dalmatians" drove sales for Disney's consumer products up 47.9%, to $787.6 million, for the first three quarters of Disney's fiscal 1992, which ends Sept. 30.

Disney's consumer products division this year began stepping up its marketing activity, hiring Rubin Postaer & Associates for Disney licensed merchandise and the Disney Store retail chain.

One of Rubin Postaer's first projects will be to create holiday ads for Disney's Princess Collection products, based on classic Disney damsels Cinderella, Snow White and Sleeping Beauty.

The consumer products unit also expanded in media in 1992, buying *Family Fun* magazine. It's said to be developing a kids-oriented spinoff to *Discover*, which it bought in 1991.

Disney boosted spending for its California and Florida theme parks 11.5% to

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$75.1 million in 1991. Last April, it opened Euro Disney Resort outside Paris to much fanfare, only to see attendance slow sharply by midsummer.

Disney cut media spending by 4% for its feature film releases, spreading $125 million across 23 films, LNA noted. In 1990, the studio spent $130.3 million backing 19 features.

Disney slipped to the No. 2 spot in box-office market share, claiming 13.7% of the $4.85 billion market in 1991. Disney's piece of the volatile market was 15.5% in 1990.

Disney led the major studios in market share during the first half of this year, with solid hits like the thriller "The Hand That Rocks the Cradle" and the sleeper comedy "Sister Act." As the summer progressed, Disney was knocked out of first place by Warner Bros.' double team of "Lethal Weapon 3" and "Batman Returns." An animated film version of "Aladdin" will come out this holiday season.

HEADQUARTERS

Walt Disney Co./500 S. Buena Vista St./Burbank, Calif. 91521/Phone: (818) 560-1000.

PERSONNEL, BRANDS, AGENCIES

Media buying: Buena Vista Pictures Marketing, Buena Vista Television, Buena Vista Home Video, Walt Disney Attractions, The Disney Channel, Disney Consumer Products: Western International Media, Los Angeles. Dennis Holt, pres.

BUENA VISTA PICTURES (feature films): 3900 W. Alameda Ave., Suite 2400/Burbank, Calif. 91505/Phone: (818) 567-5000. Robert B. Levin, pres-worldwide mktg; Robert Jahn, sr vp-creative svcs; Bobbi Blair, sr vp-media; Gary Kalkin, sr vp-domestic mktg.

BUENA VISTA TELEVISION: 500 S. Buena Vista St./Burbank, Calif. 91521/Phone: (818) 560-1000. Carole Black, sr vp-mktg; Rick Haskins, vp-mktg.

BUENA VISTA HOME VIDEO: 500 S. Buena Vista St./Burbank, Calif. 91521/Phone: (818) 560-1000. Ann Daly, sr vp-mktg; Kelley Avery, vp-mktg. DDB Needham Worldwide, Chicago. Blake Thomas, acct super.

THE DISNEY CHANNEL: 3800 W. Alameda/Burbank, Calif. 91505/Phone. (818) 569-7500. Tom Wszalek, sr vp-cons mktg.

Disney Channel: Rubin Postaer & Associates, Santa Monica, Calif. Tom Kirk, sr vp-grp acct dir.

DISNEY CONSUMER PRODUCTS: 500 S. Buena Vista St./Burbank, Calif. 91521/Phone: (818) 840-5151. John Skipper, vp-magazine publishing; Anne Osberg, sr vp-Disney licensing; Debbie Bohnett, dir-mktg and promotions, The Disney Store.

Disney Licensing, Disney Software: Earle Palmer Brown Cos., New York. Laura Bonington, acct exec.

The Disney Store, Walt Disney Filmed Entertainment Licensing: Rubin Postaer & Associates, Santa Monica, Calif. Tom Kirk, sr vp-acct dir.

WALT DISNEY ATTRACTIONS: 1675 Buena Vista Drive, Suite 310/Lake Buena Vista, Fla. 32830/Phone: (407) 828-1300. Tom Elrod, pres mktg/entertainment.

RANK: 82

Dow Chemical Co.

Midland, Mich.

Ad spending: **$127.1** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	18,804	20,443	-8.0
Sunday magazine	7,328	6,975	5.1
Newspaper	622	353	76.1
Outdoor	3	42	-91.9
Network TV	42,626	64,644	-34.1
Spot TV	9,896	2,794	254.2
Syndicated TV	6,552	2,260	189.9
Cable TV networks	6,008	6,630	-9.4
Network radio	1,330	566	134.9
Spot radio	1,395	1,465	-4.8
Measured media	94,563	106,173	-10.9
Unmeasured	32,500	36,500	-11.0
Total	127,063	142,673	-10.9
By top brands	**1991**	**1990**	**% chg**
Ziploc food storage bags	19,278	15,668	23.0
Seldane allergy medication	12,410	11,053	12.3
Dow Chemical Co.	10,358	14,112	-26.6
Texize cleaning products	9,081	11,861	-23.4
Perma Soft haircare products	8,216	5,767	42.5
Nicorette nicotine gum	7,177	9,507	-24.5
Fantastik cleaner, spray	6,930	6,722	3.1
Saran Wrap	6,310	1,433	340.4
Dow Bathroom Cleaner	5,685	4,012	41.7

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	18,807	19,773	-4.9
Earnings	935	1,378	-32.1
U.S.	**1991**	**1990**	**% chg**
Sales	9,079	9,494	-4.4
Operating income	1,136	1,622	-30.0
Division sales	**1991**	**1990**	**% chg**
Chemicals, performance products	4,522	5,088	-11.1
Plastics	6,822	7,392	-7.7
Hydrocarbons	1,933	2,210	-12.5
Consumer specialties	5,483	5,053	8.5

CORPORATE PROFILE

Dow Chemical Co. last year demonstrated the importance of its long-term strategy to diversify into consumer specialties. It was the only one of four main business segments at Dow to produce a sales gain in 1991.

The segment, which includes Marion Merrell Dow pharmaceuticals and DowBrands among others, posted record sales and operating income—the latter accounting for 57% of the company's total operating income in 1991.

Seldane, the world's top-selling line of anti-allergy products, led Marion Merrell Dow's battery of brands with global sales of $768 million, including $47 million in U.S. sales of Seldane-D, the first non-sedating, antihistamine-decongestant combination. Introduced last September, Seldane received $12.4 million in media in 1991, according to LNA/Arbitron Multi-Media Service.

Dow's plans to take Seldane over the counter got a setback in July when reports said the drug had health risks if taken under certain conditions. The FDA told the company to strengthen the drug's warning on its labels. Seldane accounts for 70% of the prescription antihistamine market. It loses patent protection in 1994.

Competitor antihistamines, Tavist-1 and Tavist-D from Sandoz Pharmaceutical Co., got the OTC jump on Seldane when they got FDA approval this August. A $45 million ad campaign is set to launch the Sandoz products.

Nicoderm, a nicotine skin patch, was delayed entering the market because of a patent infringement lawsuit, and once on the market in January the product supply couldn't keep up with heavy demand. As a result, the company quickly lost market share, dropping from 51% in January to 21% two months later before rebounding to about 37% in August, according to Michael Walsh, VP at Robertson, Stephens. He estimates the market will hit $1.2 billion by yearend.

Marion Merrell Dow last month announced it would combine its U.S. OTC brands with SmithKline Beecham. The partnership, called SmithKline Beecham Consumer Brands, will market Marion's Gaviscon, Cepacol, Citrucel and Os-Cal, along with SmithKline's Tums, Contac, Oxy and Aqua-Fresh. The venture will be based in Pittsburgh. SmithKline agencies are expected to handle advertising for Marion's OTC products.

DowBrands focused resources on its core brands, with media spending increasing almost 50% each for Ziploc food storage bags, Dow Bathroom Cleaner, Spray 'n Wash and Fantastik multipurpose cleaner. Spending vanished for Spiffits moist cleaning towels because of a rapid decline in sales of this product category.

Ziploc remains the top zippered bag with 1991 sales of $190.3 million, a 1.1% gain, according to Information Resources Inc.'s food-store sales audit. Ziploc received $19 million in media in 1991.

Fantastik, with more than $6 million in media, claimed third in its $287.5 million category, according to Nielsen Marketing Research. The leader is Formula 409 from Clorox Co. Dow was the No. 1 brand in the $142.9 million bathroom cleaner category.

HEADQUARTERS

Dow Chemical Co./2030 Willard H. Dow Center/Midland, Mich. 48674/Phone: (517) 636-1000.

PERSONNEL, BRANDS, AGENCIES

DOW CHEMICAL USA: 2030 Building/Abbott Road/Midland, Mich. 48674/Phone: (517) 636-1000. William Stavropoulos, pres; Thomas Smith, vp-govt/public affairs; Robert Charlton, dir-corp comms; Richard Dalton, mgr-corp adv.

D'Arcy Masius Benton & Bowles, Bloomfield Hills, Mich. H.J. Hogan, sr vp-mgmt super.

CHEMICALS & PERFORMANCE PRODUCTS: 2020 Building/Abbott Road/Midland, Mich. 48674/Phone: (517) 636-1000. John W. Tysse, vp-sales/mktg; Bo Miller, grp mgr comms.

Chemicals & metals: Hoffman, York & Compton, Milwaukee. John Murphy, sr vp.

Public relations, chemicals & metals, performance products, latex products: Gibbs & Soell, New York. Cos Mallozzi, pres.

Latex products: Weller, Cook & Misamore, Grand Rapids, Mich. Robert Cook, vp.

Performance products, separation systems, new ventures: Alexander Marketing Services, Grand Rapids, Mich. Robert Milroy, pres.

DOW PLASTICS: 2040 Building/Abbott Road/Midland, Mich. 48674/Phone: (517) 636-3050. Richard E. Sosville, vp-sales/mktg.

Dow Plastics products: Anderson & Lembke, Stamford, Conn. Mike Romans, vp-client bus mgr. Alexander Marketing Services, Grand Rapids, Mich. Robert Milroy, pres. Jayme Organization, Cleveland. Mike Paulus, acct exec.

Dow Plastics prods & public relations adv: Sefton Associates, Grand Rapids, Mich. Gary Ptertyl, sr vp.

Public relations adv: Gibbs & Soell, New York. Cos Mallozzi, pres. Proconsul, Cleveland. Judi Feniger, vp, Proconsul.

DOW BRANDS/9550 Zionsville Road/Indianapolis, Ind. 46268/Phone (317) 873-7000. Lee Schobe, pres-ceo; Jim Bernhardt, vp-mktg; Ann Bastianelli, dir-adv.

Foodcare (Ziploc bags, Saran Wrap); Personal Care Products (Perma Soft): Campbell-Mithun-Esty, Minneapolis. Richard Rosengren, sr vp-mgmt super-Foodcare; John Purdy, vp-mgmt super, Personal Care Products.

Cleaning products (Fantastik, Dow Bathroom Cleaner): Henderson Advertising, Greenville, S.C. Stephanie Stockton, acct exec.

MARION MERRELL DOW: 9300 Ward Parkway, Kansas City, Mo. 64114-2321/Phone: (816) 966-4000. John Julian, vp-mktg; John Bruton, dir-adv.

Carafate: McCann Healthcare, Chicago. Mike Perry, vp client svcs.

Cardizem family: RWR, New York. Tyrone Curran, acct exec.

Ditropan, Lorelco, Norpramin, Silvadene: MMD Advertising (in-house). John Bruton, dir of adv.

Nicorette, Nicoderm: Lewis & Gace, Fort Lee, N.J. Francis Gace, pres; Steve Barrett, acct exec.

Seldane: Medicus Consumer DMB&B, New York. Joan Lemler, acct super. Medicus Intercon, New York. Neil James, sr vp-grp acct dir.

Cepacol: Sive/Young & Rubicam, Cincinnati. Mark Wesling, acct super.

Citrucel: (prof) Medicus Intercon, New York. Loraine Pastore, vp. (consumer) McElligott Wright Morrison White Minneapolis. John Gerzema, acct super.

Gaviscon: (prof) Kallir, Philips, Ross, New York. Virginia Foley, sr vp-mgmt super. (consumer) Sive/Young & Rubicam, Cincinnati. Mark Wesling, acct super.

Targocid: Bozell, New York. Chris Paynes, acct exec.

DOW ELANCO AGRICULTURAL PRODUCTS: 9002 Purdue Road/Indianapolis, Ind. 46268-1189/Phone (317) 876-5800. Frank Moore, mgr-mktg comms; E.N. German, mgr-mktg sales support.

Stinger, Curtail, Tordon, professional pest control, vegetation management, retail turf, ornamental business: Bader Rutter & Associates, Brookfield, Wis. Miller Hogan, vp-acct super.

Lorsban, Treflan, Sonalan, N-Serve, Stinger (corn), Lontrel, Tordon, Curtail, Surflan, Telone, Paarlan, Rubigan, Broadstrike: Creswell, Munsell, Fultz & Zirbel, Cedar Rapids, Iowa. M. White, sr vp-mgmt super.

Professional turf and ornamental business: Bader Rutter & Associates, Brookfield, Wis. Miller Hogan, vp-acct svcs.

RANK: 74

Dr Pepper/ Seven-Up Cos.

Dallas

Ad spending: **$131.4** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Newspaper	436	214	103.6
Outdoor	448	302	48.4
Network TV	52,380	44,484	17.8
Spot TV	13,490	11,122	21.3
Syndicated TV	14,751	11,389	29.5
Cable TV networks	2,551	2,020	26.3
Network radio	0	363	NA
Spot radio	875	1,522	-42.5
Measured media	84,932	71,416	18.9
Unmeasured	46,500	39,100	18.9
Total	131,432	110,516	18.9
By top brands	**1991**	**1990**	**% chg**
7UP beverages	27,879	31,941	-12.7
Dr Pepper sugar-free	23,573	6,584	258.1
Dr Pepper beverage	23,380	24,084	-2.9
Diet 7UP beverage	9,871	8,494	16.2

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	601	540	11.2
Earnings	(20)	(93)	NA

CORPORATE PROFILE

Dr Pepper/Seven-Up Cos. pumped up its ad budget in 1991, devoting the bulk of its extra spending to relaunch Diet Dr Pepper.

Media price tag for the relaunch was $23.5 million, which helped generate a 128% increase in sales of Diet Dr Pepper. The company spent only $6.5 million on the brand in 1990, according to LNA/Arbitron Multi-Media Service.

Regular Dr Pepper registered a healthy $23.2 million in ad spending, down slightly, and claimed 5.5% of the $47 billion market, up 0.6 points from 1990, according to Beverage Digest. It's the nation's fifth best-selling soft drink, a spot it's held since 1987.

Locked in battle with Coca-Cola Co.'s lemon-lime Sprite, 7UP again saw market share drop 0.1 point to 2.6%. Sprite, meanwhile, gained 0.2 point to 3.9%. Diet 7UP share remained flat at 0.8%, compared with Diet Sprite's 0.9%.

The company in 1991 brought back "the uncola," its dormant ad slogan, and boosted media spending 17% to $10 million behind Diet 7UP. In 1991, Diet 7UP received about $10 million in spending, up 17%. Media declined 20% to $20 million for 7UP.

Dr Pepper/Seven-Up Cos. last spring attempted to go public but pulled back when its initial offering failed to attract the investment the company expected.

HEADQUARTERS

Dr Pepper/Seven-Up Cos./8144 Walnut Hill Lane/Dallas, Texas 75231/Phone: (214) 360-7000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: John Albers, chmn-pres-ceo; Fran I. Mullin, pres-coo, Seven-Up Co.; True H. Knowles, Dr Pepper Co. pres-coo; Russ B. Klein, sr vp-mktg, 7UP; Jim Watkins, vp-mktg svcs, 7UP brands; Bill Tolany, vp-mktg svcs, Dr Pepper brands, David Clapp, vp-new prods; Mike McGrath, vp-Premier Beverages' Welch's carbonated soft drinks, I.B.C. root beer.

Hispanic adv: Dr Pepper: Bravo, New York, Linda DeJesus, acct super. **7UP:** Leo Burnett Hispanic div, Chicago.

Dr Pepper, Diet Dr Pepper, Caffeine-Free Dr Pepper, Caffeine-Free Diet Dr Pepper: Young & Rubicam, New York. John Swan, mgmt super; John O'Brien, acct super.

7UP, Diet 7UP, Cherry 7UP, Diet Cherry 7UP: Leo Burnett USA, Chicago. John Miller, exec vp; Jack Woods, vp-acct dir.

RANK: 10

Eastman Kodak Co.

Rochester, N.Y.

Ad spending: **$661.4** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	38,754	44,813	-13.5
Sunday magazine	4,032	4,684	-13.9
Newspaper	1,797	777	131.2
Outdoor	853	1,863	-54.2
Network TV	105,555	116,523	-9.4
Spot TV	18,291	13,364	36.9
Syndicated TV	27,811	21,651	28.5
Cable TV networks	19,092	12,589	51.7
Network radio	0	1,320	NA
Spot radio	872	1,253	-30.4
Measured media	217,057	218,837	-0.8
Unmeasured	444,300	406,400	9.3
Total	661,357	625,237	5.8
By top brands	**1991**	**1990**	**% chg**
Kodak cameras & accessories	77,078	70,345	9.6
Lysol disinfectants	19,551	15,655	24.9
Bayer aspirin	15,290	17,325	-11.7
Thompson coatings	11,400	11,264	1.2
Lysol bathroom cleaners	11,203	15,434	-27.4
Dairy Ease digestion tablets	10,270	2,955	247.6
Lysol cleaners	8,803	6,899	27.6
Minwax finishes	6,669	5,197	28.3
Phillips Milk of Magnesia laxative	6,408	7,042	-9.0
Resolve carpet cleaner	6,255	4,290	45.8
Ogilvie home permanents	5,623	4,719	19.2

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	19,419	18,908	2.7
Earnings	17	703	-97.6
U.S.	**1991**	**1990**	**% chg**
Sales	10,882	10,663	2.1
Operating earnings	108	1,698	-93.6
Division sales	**1991**	**1990**	**% chg**
Imaging	7,075	7,128	-0.7
Chemicals	3,740	3,588	4.2
Health	4,917	4,349	13.1
Information	3,968	4,140	-4.2

CORPORATE PROFILE

Eastman Kodak Co. in 1991 restructured—the fourth time since 1982—by cutting staff, shedding businesses and realigning the remaining divisions.

While the company believes the restructuring, which resulted in a $1.6 billion charge against earnings, will bring savings that will stick, many industry analysts believe Kodak must continue to revamp before even initial gains become long-term.

Analysts say Kodak must sell unprofitable businesses and slash research costs in its information systems unit. At Sterling Winthop, it must bring new proprietary drugs to market, which hasn't occurred in five years. In imaging, Kodak has to achieve better success with Photo CD.

Photo CD, introduced to consumers last month, allows users to store photos on compact discs so they can be viewed and edited on TV and computers; the special hookup costs $400-$500. Kodak is caught in a classic marketing bind, since consumers may not want to fork over $20-$25 for Photo CD when they don't yet have the hardware on which to view it.

Photo CD in two years on the market has been popular among businesses and professional photographers. The company last month introduced several new business uses, including catalogs on CD that can be viewed on TV sets or computers.

In June, Kodak consolidated its estimated $73 million U.S. consumer photography products account at J. Walter Thompson USA, New York. That agency, which had film and film processing, got cameras from Young & Rubicam, an estimated $13 million piece of business. The realignment came after Kodak shifted its marketing strategy to push product lines rather than individual products. In second quarter 1993, Kodak plans to launch its first global campaign supporting the Kodak brand name.

Spending on Kodak's biggest ad-supported categories—film and film processing—jumped 20% in 1991 to $84 million. Much of Kodak's budget is expected to be placed behind the launch of Photo CD in late 1992 and 1993.

Sterling Winthrop is the new name for Sterling Drug. Part of pharmaceuticals is Sanofi Winthrop, the company's joint venture with Sanofi, the French drug marketer.

Sterling spent $15.3 million on the Bayer line, down 11.7%. A non-aspirin Bayer will be launched in 1993. Bayer holds 6.6% of the $2.3 billion-plus analgesics market, down from 6.7% last year, according to Nielsen Marketing Research.

Sterling in mid-1992 introduced Midol PM Nighttime Formula, a line extension of the acetaminophen-based Midol. Midol also restaged Midol 200, an ibuprofen-based product, as Midol IB Cramp Relief. Midol drew media support of $4.6 million. It owns more than 70% of the menstrual pain relief segment.

Fresh Scent Lysol disinfectant and Lysol Pine basin, tub and tile cleaner were added to the extensive Lysol product line at L&F Products, which boosted support behind the brand 21% to $39.5 million, noted LNA. Lysol is the No. 2 brand with market share of 30.9% in the $193.7 million disinfectant cleaner category, according to Nielsen.

In the $142.9 million bathroom cleaner segment, Lysol, with market share of 27.2%, trails only Dow Chemical Co.'s Dow bathroom cleaner.

HEADQUARTERS

Eastman Kodak Co./343 State St./Rochester, N.Y. 14650/Phone: (716) 724-4000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Richard S. Bartlett, director and vp-Imaging Communications. **Amateur film, photofinishing, Photo CD, cameras:** J. Walter Thompson USA, New York. Rodger Groves, mgmt dir.

Business, Industrial: J. Walter Thompson USA, New York. John Mittnocht, sr vp-acct dir.

Professional imaging, Motion Picture and Television imaging, consumer products-sales promo, film-trade adv.: Rumrill-Hoyt, Rochester, N.Y. Vicki Lewis, vp-acct dir.

STERLING WINTHROP: 90 Park Ave./ New York, N.Y. 10016/Phone: (212) 907-2000. Hilary Hinchman, vp-dir of adv svcs.

STERLING HEALTH USA: 90 Park Ave./New York, N.Y. 10016/Phone: (212) 907-2000. Doug Meyer, pres; Dave Mahder, vp-mktg; Larry Koslow, category dir-analgesics; Susan Danehower, dir-new products and category dir-skincare and cough/cold; Lisa Rubin, category dir-gastrointestinals; Gerard Mattimore, dir-mktg svcs; MaryLou Ulincy, dir-consumer affairs; Gerry Minichiello, dir-mkt rsch.

Bayer, Panadol, Midol: N W Ayer, New York. Dom Rossi, pres-Ayer USA.

Phillips' line, Dairy Ease, Stri-Dex, Campho-Phenique, Neo-Synephrine, NaSal: Ammirati & Puris, New York. Mary Herrmann, exec vp-grp dir.

Medical Communications: Analgesics: Harrison, Star, Wiener & Beitler, New York. Tom Harrison, pres. Gastrointestinals: Sweeney & Partners, Montvale, N.J. Tom Sweeney, pres.

Public Relations: Manning, Selvage & Lee, New York. Ken Lightcap, mg dir.

SANOFI WINTHROP PHARMACEUTICALS (USA): 90 Park Ave./New York, N.Y. 10016/Phone: (212) 907-2000. Harry Shoff, pres; Jim Ryan, dir-mktg, pharmaceutical prods div.

Omnipaque Radiology, Omnipaque Cardiology, Omniscan: Lally, McFarland & Pantello, New York. Ron Pantello, pres.

Plaquenil, Inocor I.V.: Kallir, Philips, Ross, New York. Norman Cooper, pres.

Nitrong, Talacen, Talwin NX: Robert A. Becker Inc., New York. Sander Flaum, pres.

L&F PRODUCTS: 225 Summit Ave./Montvale, N.J. 07645-1575/Phone: (201) 573-5700. Peter Black, group vp; Hilary Hinchman, vp-adv svcs; Jimmie Byrum, vp-sales/household prods div; Terry Shunnarah, vp-sales/personal prods div; John Culligan, vp-mktg/National Laboratories Div; Bruce Letsch, vp-sales/National Laboratories Div.; Richard Bachman, vp-mktg/Minwax; Kathy Tousignant, vp-sales/Minwax; Frederick Miller, vp-mktg/Thompson & Formby; Thomas Harris, vp-sales/Thompson & Formby.

Lysol disinfectant products, Love My Carpet, Mop & Glo, Perk, Red Devil Enamels: Lintas:New York, New York. John Barnes, exec vp.

Lysol Direct, Glass Mates, Resolve Carpet Cleaner, d-Con rodenticides, Chubs Thick Baby Wipes, Diaparene Baby Wipes, Wet Ones Moist Towelettes: Warwick Baker & Fiore, New York. John Sloan, sr vp-grp acct dir.

RID-X septic tank additive: Ramm Advertising, Cranford, N.J. Ed Ramon, pres.

Ogilvie, Tussy, Dorothy Gray: Jordan, McGrath, Case & Taylor, New York. Linda Schaler, sr vp-mgmt super.

National Laboratories Professional Products: Brancaccio/Christofer/Shields, New York. Robert Brancaccio, pres.

Minwax: Gilbert, Whitney & Johns, Whippany, N.J. John Leonardi, pres.

Thompson & Formby: Slater Hanft Martin, New York. Terry Koch-Bostic, sr vp-mgmt super.

RANK: 46

Federated Department Stores

Cincinnati

Ad spending: **$222.8** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	1,928	1,520	26.9
Sunday magazine	551	1,027	-46.4
Newspaper	91,818	134,483	-31.7
Outdoor	16	0	NA
Spot TV	15,341	17,856	-14.1

Who buys spot/local TV?

Marketers in a wide range of product categories, both national and local, have discovered the effectiveness and efficiencies of spot television advertising and have increased their investments in the medium to these current levels.

Top 25 spot TV ad categories 1991

Rank	Category	Dollars spent
1.	Automotive	$1,252,152,700
2.	[illegible]	[illegible]
3.	Consumer Services	380,679,900
4.	Confectionery & Soft Drinks	[illegible]
5.	Toiletries & Toilet Goods	267,102,400
6.	Travel, Hotels & Resorts Outside U.S.	258,749,400
7.	Proprietary Medicines	[illegible]
8.	Beer & Wine	207,172,800
9.	Sporting Goods & Toys	182,129,800
10.	Soaps, Cleansers & Polishes	162,953,800
11.	Gasoline, Lubricants & Other Fuels	151,680,500
12.	Apparel, Footwear & Accessories	102,232,800
13.	Home Electronics Equipment	102,076,700
14.	Insurance	100,286,300
15.	Publishing & Media	99,335,700
16.	Household Equipment & Supplies	93,885,300
17.	Building Mat., Equip. & Fixtures	53,563,300
18.	Freight & Industrial Development	43,220,300
19.	Horticulture	35,465,100
20.	Jewelry, Optical Goods & Cameras	31,592,700
21.	Pet Foods & Supplies	28,673,100
22.	Household Furnishings	27,614,900
23.	Computers, Office Equipment, Stationery	16,519,000
24.	Agriculture & Farming	14,526,600
25.	Religious, Political & Unions	11,491,700

Top 25 local TV ad categories 1991

Rank	Category	Dollars spent
1.	Restaurants & Drive-Ins	$876,342,600
2.	Food Stores & Supermarkets	335,160,400
3.	Furniture Stores	270,149,700
4.	Auto Dealers	243,617,900
5.	Movies	221,154,200
6.	Appliance Stores	197,964,600
7.	Department Stores	193,085,900
8.	Radio Stations & Cable TV	174,203,300
9.	Banks, Savings & Loans	172,161,200
10.	Amusements & Entertainment	147,147,000
11.	Medical & Dental Services	143,271,000
12.	Leisure Time Activities & Services	137,523,300
13.	Clothing Stores	128,624,400
14.	Health Clubs & Reducing Salons	121,844,000
15.	Discount Department Stores	121,074,500
16.	Drugstores	108,823,800
17.	Home Centers & Hardware Stores	106,604,900
18.	Legal Services	102,495,600
19.	Local Education Services	98,176,100
20.	Auto Repair & Service Stations	87,145,900
21.	Personal Services, Misc.	62,418,000
22.	Optical Services & Supplies	62,095,500
23.	Hotels & Resorts, U.S.	57,225,600
24.	Carpet & Floor Covering Stores	52,576,800
25.	Sport, Hobby & Toy Stores	51,394,900

Source: Television Bureau of Advertising (TVB) from data supplied by Arbitron's MediaWatch Service in the top 75 markets

JOHN HALL

A message to Ad Age readers

from the Television Bureau of Advertising

Dear Readers:

While there is no disputing the magic of television as a powerful advertising vehicle, buying television time has become more complex as more new options present themselves. In the past few years, with the advent of cable TV and other new technologies, spot television lost some visibility and may have been relegated to the "back room" in the minds of some advertisers.

That's yesterday's news. Instead, through today's energized Television Bureau of Advertising, there is a new focus directed at advertising's decision makers. The case for spot television, with its wide-ranging flexibility, is now more compelling than ever.

Armed with dramatic case histories and new research, the geographic, demographic and psychographic attributes of spot television provide a winning part of the media mix regardless of who the target customer may be.

The new TVB is aggressively working to raise the visibility of over-the-air television in the minds of all involved. The approach is to understand the advertiser's business and how it works so that a partnership can be constructed to advance the advertising process. Here is a capsule listing of TVB actions in progress:

- The top 200 advertiser campaign—It's harnessing the power of the television reps to establish solid relationships with top national advertisers to help them better understand the advertising decision-making process.

- Market outreach—TVB is conducting face-to-face meetings with TV station sales executives and marketing executives nationwide to further mutual understanding.

- Local category development—TVB targets categories of business that are not using television to build new relationships between local television stations and advertisers.

- Association involvement—TVB participates in various industry functions, annual meetings and trade associations.

- Research projects—TVB works with universities and marketing companies to develop new insights into advertising, both qualitative and quantitative.

- Case studies—TVB tells about marketers who have discovered how to use television successfully and their incredible results.

- Political advertising—TVB is meeting with political committees and candidates to make the spot TV advertising concept part of their advertising slate.

- Cable TV—There is a quantum difference between local broadcast TV and local cable TV. TVB, in a new advertising program in *Advertising Age*, is showing just how big the differences are.

TVB has undergone major changes in the past six months along with many other media organizations. We firmly believe we are stronger and more directed than ever. We are here to help. Because we are not a vendor, we have nothing to sell . . . nothing but ideas.

We want advertisers and agencies to have an ease and comfort in using spot television because we know it really gets results. We are unique in that we are objective. We represent no one television station, but in effect we represent them all.

We welcome advertiser and agency comments. We want you to succeed.

Ave Butensky
President

About this section

The Power of Spot TV special advertising section was edited and produced by the *Advertising Age* Special Projects Department: Director, Richard L. Gordon; Design/Assistant editor, Jill D'Angelo; Cover, Kevin Fegan. Writers: Kathy Haley and Linda Cecere.

Your TV ratings: Are the data you rely on audited?

By Mel Goldberg
Executive Director
Electronic Media Ratings Council

In 1964, after Congressional hearings on broadcast ratings abuses and misuses, the Electronic Media Ratings Council (then the Broadcast Rating Council) was established.

Its function was to secure for broadcasters and related users audience measurement services that are valid, reliable, effective and viable. Over the past 28 years, this has been done by auditing the methodology and procedures of the rating services.

To do this, the rating services have fully disclosed every aspect of the methodology by which ratings information are derived, including sampling designs and procedures. Accreditation is granted when the rating service fully complies with the Minimum Criteria and Standards of the Electronic Media Rating Council.

At this time, the only accredited services are Arbitron Television Market Reports, Arbitron Radio Market Reports, Arbitron Television Meter Market Reports, MediaFax TV Audience Measurements, Nielsen Station Index (NSI), Meter Market Service (MM) and Nielsen Television Index (NTI). Ratings and research companies are not audited or accredited; only the specific rating services listed above are.■

THE POWER OF SPOT TV — ROUNDTABLE

Continued from Page T-12

thousand buyers. Some are and, yes, maybe some of that can be automated. Maybe it should be, so people could spend more time selling value-added, selling events. If everybody was cost-per-thousand oriented, no one would've bought the Olympics until the day before. Somebody has to sell that; it's not going to get done by computer.

Ave Butensky: I think I hear unanimity on at least a desire to have more buyer-seller time. What are the best things stations and reps could do to move in that direction?

Larry Cole: One is to make sure they understand what the advertiser and agency needs. The other thing is to push ahead with new ways of doing business, and electronic processing, obviously, is one of them.

Joel Kushins: The electronic future is certainly the only way to get a head of steam behind the desire to see more effectiveness and efficiency in the whole buyer/seller process. The initiatives that are being made by different factions of the industry are starting to really show their value.

The representative group spearheaded by Katz Television and Blair Communications is looking to create systems that will interface with agencies and stations. Certainly, involve the rep community in processing and selling and give them the additional time to do more of what they should be doing: That is coming up with new ideas and new ways to involve advertisers and agencies with the stations they represent.

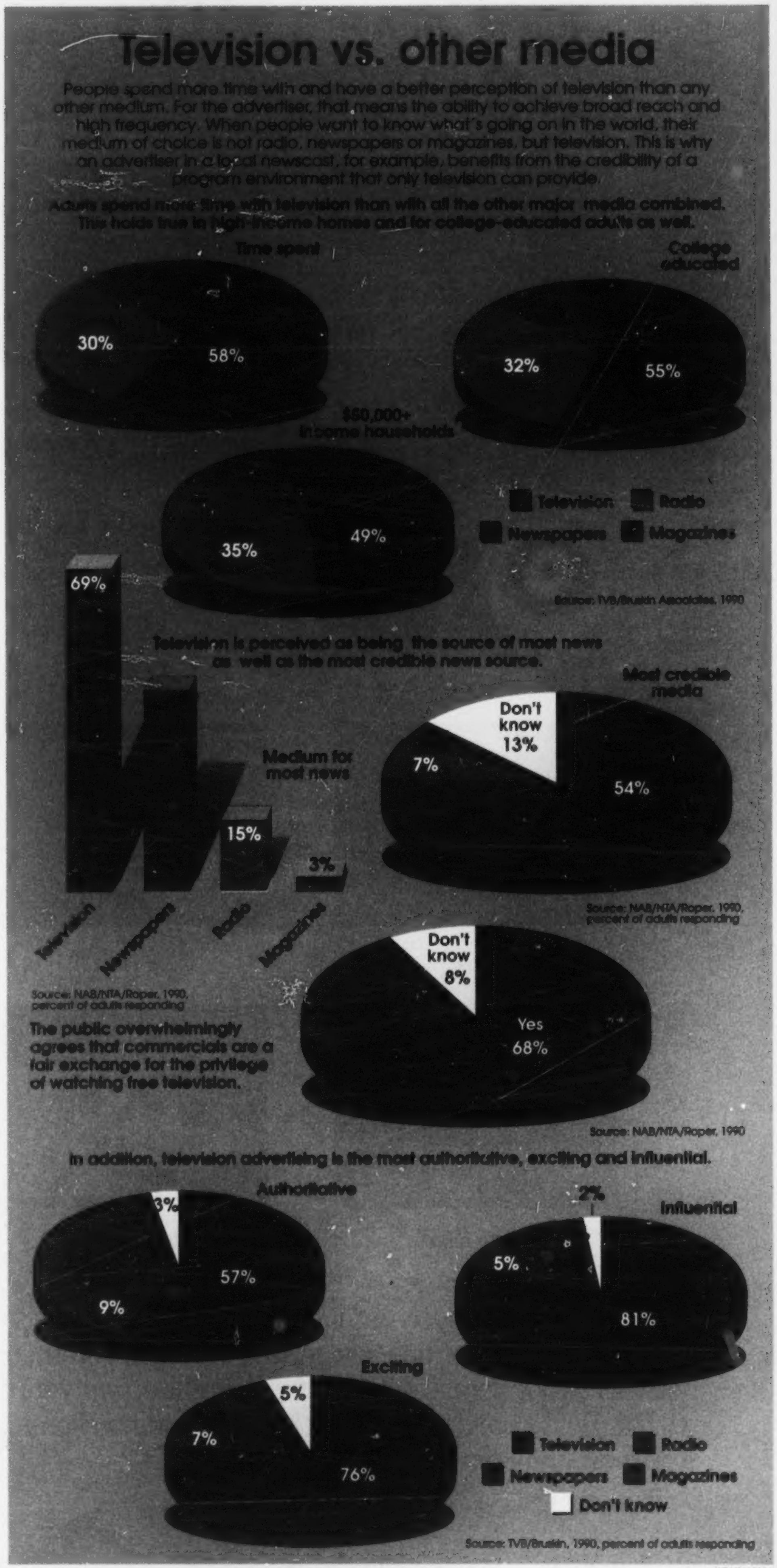
Mike Moore: The whole local broadcast business needs to become more customer-focused. And I don't say that simply because I'm a customer. That is the way everyone is going to benefit in the future.

Joe Ostrow: Both the buyer and seller have to become more forthcoming. The buyer has to tell the seller more about what he or she is looking for, has to be more candid and share more information and insight. The seller has to come back and be a little bit more transparent in terms of the information they provide us, which might include a little bit more transparency at the pricing level, too.

Ave Butensky: I thank you all.■

Television vs. other media

People spend more time with and have a better perception of television than any other medium. For the advertiser, that means the ability to achieve broad reach and high frequency. When people want to know what's going on in the world, their medium of choice is not radio, newspapers or magazines, but television. This is why an advertiser in a local newscast, for example, benefits from the credibility of a program environment that only television can provide.



JOHN HALL

By media	1991	1990	% chg
Cable TV networks	0	1	NA
Spot radio	1,741	1,108	57.2
Measured media	111,395	155,995	-28.6
Unmeasured	111,400	95,600	16.5
Total	222,795	251,595	-11.4
By top brands	**1991**	**1990**	**% chg**
Abraham & Straus apparel	13,574	13,472	0.8
Abraham & Straus misc. merchandise	11,027	11,155	-1.2
Bloomingdale's apparel	9,272	10,272	-9.7
Bloomingdale stores	9,076	11,142	-18.5
Bloomingdale's stores	8,750	12,253	-28.6
Abraham & Straus household	8,007	7,996	0.1
Jordan Marsh stores miscellaneous	5,413	4,779	13.3
Jordan Marsh stores apparel	5,179	5,831	-11.2

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	6,932	7,142	-2.9
Earnings	836	(271)	NA

CORPORATE PROFILE

Federated Department Stores and Allied Stores Corp.—former divisions of Campeau Corp.—emerged early this year from bankruptcy under the umbrella of Federated Department Stores.

The chain, now downsized to 233 stores, includes Abraham & Straus, Bloomingdale's, Bon Marche, Burdines, Goldsmith's, Jordan Marsh, Lazarus, Rich's and Stern's.

The weak economy and shifts in consumer spending have tempered revenues and profitability. First-half 1992 sales of $3.03 billion were the same as in the prior year for comparable stores. There was a net loss of $4 million, rising to $17.6 million when factoring in after-tax accrued financing fees.

Federated continues to downsize. The closing of 43 stores was announced during the bankruptcy, including six Jordan Marsh units outside New England. The Burdines store in Hollywood, Fla., will close next month and the Lazarus store in Indianapolis will shutter in January.

In October 1991, Maas Bros. merged into Miami-based Burdines, and in mid-March 1992, Jordan Marsh, originally based in Boston, was merged with the healthier Abraham & Straus. Federated named Joseph Pennachio, an Abraham & Straus senior executive, as president of Jordan Marsh, which has 20 remaining stores in New England.

Media spending at Federated stores fell 28.6% to $111.3 million, according to LNA/Arbitron Multi-Media Service. Rich's dropped from $21.4 million to $2.3 million, flagship Bloomingdale's dipped 18.8% to $30.2 million, Stern's fell 26.9% to $10.6 million and Lazarus slipped 11.8% to $7.5 million. Abraham & Straus remained static at $35.2 million. Jordan Marsh increased spending to $17 million, up 21.6%.

Federated consolidated its credit operations in suburban Cincinnati and implemented a team buying approach under Federated/Allied Merchandising Services, which now coordinates 60% of the company's purchases.

HEADQUARTERS

Federated Department Stores/7 W. Seventh St./Cincinnati, Ohio 45202/Phone: (513) 579-7000.

PERSONNEL, BRANDS, AGENCIES

ABRAHAM & STRAUS/JORDAN MARSH: 420 Fulton St./Brooklyn, N.Y. 11201/Phone: (718) 875-7200. Joseph Yewdell, sr vp-mktg/sales promo; Joe Cantor, vp-adv; Nancy Slaven, operating vp-direct mail; Martine Reardon, vp-media; Steven Cohen, vp-print creative; Nancy Ryan, vp-bdcst creative.

Martino & Co., New York. Cathy Hart, Gary Wuertenberger, acct supers.

BLOOMINGDALE'S: 1000 Third Ave./New York, N.Y. 10022/Phone: (212) 705-2000. Mike Green, vp-bus mgmt/adv; John Jay, exec vp-sales promo/mktg/creative svcs.

Bloomingdale's broadcast adv: Grey Advertising, New York. Herb Lieberman, exec vp.

BURDINES: 22 E. Flagler St./Miami, Fla. 33131/Phone: (305) 835-5151. Carey Watson, sr vp-mktg; Linda Frankel, vp-adv; Jorge Lopez, vp-adv admin/prod; Ron Rodriguez, operating vp-special events/publicity; Gilbert Lorenzo, vp-sales support mgr.

In-house.

LAZARUS: 699 Race St./Cincinnati, Ohio 45202/Phone: (513) 369-7000. Timothy Worcester, sr vp-mktg/sales promo; Herbert Frager, div vp-graphics dir; Ralph Holt, div vp-dir, adv/analysis; Becky Case, div vp-adv/special events.

In-house.

RICH'S/GOLDSMITH'S: 223 Perimeter Center Parkway/Atlanta, Ga. 30346/Phone: (404) 913-4000. Donald Van Suilichem, sr vp-mktg dir; Alma Freedman, div vp-adv dir; John Thomas, vp-creative dir.

In-house.

BON MARCHE: Third & Pine Sts./Seattle, Wash. 98181/Phone: (206) 344-2121. John Buller, sr vp-mktg/sales promo; Kevin Gardiner, div vp-adv creative; Mark Gordon, photo studio dir; Garry Gilbert, print prod dir; Bev Davies, bdcast dir; Sue Sleeth, direct mail/pre-print dir; Val Walser, adv operations dir; Mary Jean Stephens, spec events dir.

In-house.

STERN'S: Bergen Mall/Route 4/Paramus, N.J. 07652/ Phone: (201) 845-8400. Howard Fraser, sr vp-mktg/adv; Robert Cole, adv dir.

In-house.

RANK: 9

Ford Motor Co.

Dearborn, Mich.
Ad spending: **$676.6** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	149,634	148,124	1.0
Sunday magazine	3,417	1,137	200.6
Newspaper	27,155	25,881	4.9
Outdoor	1,706	2,481	-31.2
Network TV	217,456	196,898	10.4
Spot TV	78,384	54,110	44.9
Syndicated TV	17,393	13,707	26.9
Cable TV networks	14,036	9,370	49.8
Network radio	6,022	14,874	-59.5
Spot radio	2,497	4,012	-37.8
Measured media	517,700	470,593	10.0
Unmeasured	158,900	144,500	10.0
Total	676,600	615,093	10.0
By top brands	**1991**	**1990**	**% chg**
Ford cars	255,355	220,893	15.6
Ford trucks & vans	105,274	108,275	-2.8
Mercury cars	83,020	65,002	27.7
Lincoln cars	35,575	29,906	19.0
Jaguar cars	15,004	20,000	-25.0
Ford parts	6,983	2,995	133.2

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	88,286	97,650	-9.6
Earnings	(2,258)	860	-362.5
U.S.	**1991**	**1990**	**% chg**
Sales	61,149	69,912	-12.5
Division sales	**1991**	**1990**	**% chg**
Automotive	72,051	81,844	-12.0
Financial svcs	16,235	15,806	2.7

CORPORATE PROFILE

Cost-cutting moves and the increased interest of U.S. car buyers in its makes are beginning to turn around Ford Motor Co., after a year of heavy losses for the marketer and its rivals.

Ford reported a $205 million profit for the first six months of 1992, which follows a record loss for the full year 1991. Its U.S. market share climbed to 21% for the first half of the year, up from 20% at the end of 1991.

The $100 million redesign of the Taurus/Sable models has paid off in hot sales in 1992. Ford fortunes have ridden on the Taurus, which is challenging the Honda Accord for the overall U.S. vehicle lead in sales, and on Explorer, the first sport-utility vehicle to crack the Top 10 sales chart.

Ford, boasting five of the 10 top-selling vehicles in the nation, continues to record strong truck sales, up 18.5% in the first six months of 1992 over the same period last year. Its share of the truck market stood at 29.7% for 1992's first half, up slightly from 1991. The Ford F Series of pickup trucks was the nation's top seller again in 1991, with Explorer/Bronco II No. 3 and Ranger compact pickup No. 4.

New vehicle launches in 1992 include the '93 Probe and Mercury Villager minivan models and the Lincoln Mark VIII.

In July, Ford went national with its one-price strategy ($9,999 for pre-equipped units) for the Escort, eliminating haggling between dealers and car buyers.

Ford's Jaguar Cars unit still suffers from perceptions of quality and lack of new products. It lost a combined $430 million in 1990 and 1991, and is still in the red for the first half of 1992. Jaguar drove its $20 million U.S. ad account from Geer, DuBois, New York, to Ford agency Ogilvy & Mather in July.

Ford put the bulk of its ad spending behind Escort, Taurus, Sable, Crown Victoria, Marquis and various truck models.

Ford revamped its magazine strategy, slightly increasing its spending but slashing at least 40 titles from the schedule.

HEADQUARTERS

Ford Motor Co./The American Road/Dearborn, Mich. 48121/Phone: (313) 322-3000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Hal Augustine, adv/comms mgr.

Wells Rich Greene BDDP, New York. William Benton, exec vp-Detroit.

FORD DIV: 300 Renaissance Center/P.O. Box 43303/Detroit, Mich. 48243/Phone: (313) 446-7730. Ross Roberts, vp-gm; Phil Novell, genl sales mgr; Keith Magee, genl mktg mgr; John Vanderzee, adv mgr; Robert Gillooly, car adv mgr; Dave Pohlod, light truck ad mgr; Toby Hynes, merch mgr.

J. Walter Thompson USA, Detroit. Peter Schweitzer, vice chmn-agency operations worldwide.

Minority adv: Burrell Advertising, Chicago. Charles McClellan, vp-acct dir.

LINCOLN-MERCURY DIV: 300 Renaissance Center/P.O. Box 43322/Detroit, Mich. 48243/Phone: (313) 446-4368. Lee Miskowski, vp-gm; Mark Hutchins, genl sales mgr; Stephen Lyons, genl mktg mgr; Gerry Donnelly, ad mgr; Don Kaegi, merch mgr; Chuck Schneider, major mktg dealer ad mgr.

Young & Rubicam, Detroit. Michael Howe, pres-ceo. Minority adv: UniWorld Group, New York. Fermina Platon, vp-dir mktg.

FORD PARTS & SERVICE DIV: E2 3000 Schaefer Rd./Dearborn, Mich. 48121/Phone: (313) 337-8724. Thomas Wagner, vp-gm; Ron Goldsberry, genl sales/mktg mgr.

Ogilvy & Mather, Dearborn, Mich. Jan Starr, sr vp-gm.

FORD MOTOR CREDIT: The American Road/Dearborn, Mich. 48121/Phone: (313) 594-1096. Jack Clissold, exec vp-N. American auto financing.

Wells Rich Greene BDDP, New York. William Benton, exec vp-Detroit.

JAGUAR CARS: 555 MacArthur Blvd./Mahwah, N.J. 07430/Phone: (201) 818-8500. Michael Jackling, vp-sales and mktg; Robert Burden, vp-mktg svcs; Michael O'Driscoll, mktg plans mgr; Alan Taylor, ad mgr.

Ogilvy & Mather, New York. David Murphy, sr vp-client svcs dir.

RANK: 55

General Electric Co.

Fairfield, Conn.
Ad spending: **$198.8** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	36,578	36,718	-0.4
Sunday magazine	581	1,502	-61.3
Newspaper	14,601	17,013	-14.2
Outdoor	1,220	1,135	7.5
Network TV	17,967	23,302	-22.9
Spot TV	6,487	16,776	-61.3
Syndicated TV	468	221	111.2
Cable TV networks	3,854	2,675	44.1
Network radio	6,427	5,775	11.3
Spot radio	2,627	2,584	1.6
Measured media	90,809	107,700	-15.7
Unmeasured	108,000	128,100	-15.7
Total	198,809	235,800	-15.7
By top brands	**1991**	**1990**	**% chg**
NBC TV network	39,626	39,467	0.4
General Electric Co.	11,257	21,232	-47.0
GE major appliances	9,097	6,356	43.1
GE lighting equipment	7,094	8,001	-11.3
GE stoves & ranges	5,962	1,183	404.1

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	60,236	58,414	3.1
Earnings	2,636	4,303	-38.7
U.S.	**1991**	**1990**	**% chg**
Sales	52,812	51,270	3.0
Operating profit	7,062	6,862	2.9
Division sales	**1991**	**1990**	**% chg**
Aerospace	5,326	5,614	-5.1
Aircraft engines	7,899	7,558	4.5
Broadcasting	3,121	3,236	-3.6
Industrial	6,928	7,040	-1.6
Appliances	5,451	5,706	-4.5
Materials	4,722	5,146	-8.2
Power systems	6,185	5,804	6.6
Technical prods, svcs	5,224	4,783	9.2
GEFS	1,275	14,774	-91.4
Other	270	275	-1.8

CORPORATE PROFILE

General Electric Co. continued to bring good things to life in 1991, albeit under a somewhat dimmer light bulb. Four of GE's business units faltered, NBC included, as GE rose a modest 3% in U.S. earnings on similar growth in revenues.

NBC didn't do much for the bottom line as operating profit for the broadcasting division fell 56% on a 3.6% decrease in revenues, due primarily to poor performance by the network.

GE Lighting division and NBC are teaming up this fall for their first joint promotion since GE acquired the broadcasting company in 1987. The "Win with GE, be on NBC" promotion is said to be the largest network TV promotion effort ever.

NBC is staging a variety of new promotions this fall to reposition itself from a broad-based network to one targeted primarily at younger viewers. Partners for joint promos include the Comedy Central cable network, *Rolling Stone* and *US* magazines, and Target Stores. NBC will employ a conventional paid media and promotion strategy with an estimated budget of $40 million in advertising to tout specific network series.

In GE Lighting, corporate media spending was slashed 47% to $11.3 million as the company put more funding behind appliances, according to LNA/Arbitron Multi-Media Service.

GE Appliances received $15.1 million in media, up 101%, noted LNA. The segment introduced a full line of high-end Profile appliances in 1992.

The Profile line, GE Lighting and corporate image ads received an unusually heavy media schedule during NBC's coverage of the 1992 Summer Olympics in Barcelona.

HEADQUARTERS

General Electric Co./3135 Easton Turnpike/Fairfield, Conn. 06431/Phone: (203) 373-2211.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Richard A. Costello, mgr-corp mktg comms; James R. Harman, mgr-corp adv; Victor H. Alcott, mgr-GE Appliances adv; James S. Pomeroy, mgr-GE Lighting adv; Patricia D. Yoder, vp-pr/adv, GE Capital.

Brand image, corp adv, major appliances, lighting: BBDO Worldwide, New York. John Marchese, acct dir-corp mktg/GE Appliance Group; Ken Angel, acct dir-GE auto headlamps/GE batteries/GE Retail Lighting.

GE Capital: McCann-Erickson Worldwide, New York. Rob McKinley, sr vp-grp dir.

NBC ENTERTAINMENT: 30 Rockefeller Plaza, New York, N.Y. 10112/Phone: (212) 664-4444. John D. Miller, exec vp-adv/promo, daytime/children's programs; Alan Cohen, sr vp-mktg, NBC TV; Vince Manze, vp-adv/promo; Tim Miller, vp-adv/promo East Coast; Jim Vescera, vp, on-air promo; Martha Stanville, vp-affiliate adv/promo svcs; Jenness Brewer, vp-print adv; Marla Goldstein, dir-media planning.

D'Arcy Masius Benton & Bowles, Los Angeles. Jim Helin, mg dir.

RANK: 19

General Mills

Minneapolis
Ad spending: **$555.6** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	17,450	18,389	-5.1
Sunday magazine	447	751	-40.5
Newspaper	276	2,531	-89.1
Outdoor	640	514	24.6
Network TV	151,432	142,851	6.0
Spot TV	201,032	191,497	5.0
Syndicated TV	13,809	15,137	-8.8
Cable TV networks	31,835	27,411	16.1
Network radio	1,669	5,036	-66.9
Spot radio	487	2,464	-80.2
Measured media	419,077	406,581	3.1
Unmeasured	136,500	132,400	3.1
Total	555,577	538,981	3.1
By top brands	**1991**	**1990**	**% chg**
Cheerios cereal	68,060	81,771	-16.8
Red Lobster restaurants	64,334	60,799	5.8
Total cereal	32,540	42,150	-22.8
Betty Crocker dinners	18,104	15,719	15.2
Triples cereal	17,435	0	NA
Wheaties cereal	16,206	13,175	23.0
Betty Crocker snacks	14,026	9,299	50.8
Kix cereal	13,728	13,482	1.8
Lucky Charms cereal	13,615	11,290	20.6
Trix cereal	13,507	11,930	13.2

SALES & EARNINGS ($ in millions)

Worldwide	1992	1991	% chg
Sales	7,778	7,153	8.7
Earnings	496	473	4.8
U.S.	**1992**	**1991**	**% chg**
Sales	7,040	6,377	10.4
Operating profits	896	806	11.2
Division sales	**1992**	**1991**	**% chg**
Consumer foods	5,234	4,940	6.0
Restaurants	2,544	2,214	14.9

CORPORATE PROFILE

General Mills, in boosting media expenditures and recording domestic unit volume growth, took the road not taken by many of its food industry peers.

The company hiked corporate ad spending, albeit a minimal 3.1%, in 1991 and notched unit volume growth of 7.1% for its domestic package-foods business in the fiscal year ended May 31, 1992. Growth was paced by the Big G cereal division, which had sales of $2.3 billion.

That division will get a big boost with the acquisition of RJR Nabisco's cold cereals business. The deal gives General Mills the Shredded Wheat franchise, and a business with a current market share of 3% (down from 5% two years ago). Without RJR Nabisco's lines, Big G was No. 2 in the $8 billion cereal category with a 24.9% pound share in the first six months of 1992, up 0.2 points from the end of 1991, according to Nielsen Marketing Research. Kellogg Co. leads with 37.4%.

Line extensions in the first half of 1992 accounted for half of Big G's 6% unit volume increase for fiscal 1992. They included Wheaties Honey Gold, Multi Grain Cheerios and a Breakfast Pack of assorted single-serving boxes.

Spending dropped 16.3% on the three older Cheerios products and 22.8% on the three Total brands while General Mills supported Triples, a Rice Krispies look-alike, with $17.4 million in its first year, and introduced Basic 4 with $13.4 million.

The Betty Crocker division, which posted a 13% increase in volume growth, remained No. 1 in the $1 billion dessert mixes market with about a 43% share. In the $324 million cake mix category, Betty Crocker's 34.9% share remained second to Duncan Hines, a Procter & Gamble Co. brand which slipped 0.2 point to 37.1%.

In the $184 million brownie mix category, Betty Crocker boosted its share to 42.7% from 40.6%, extending its lead over Duncan Hines, which fell to 24.7% from 26.9%, according to Nielsen. This summer, the division introduced Betty Crocker Supreme dessert bar mixes, with brand-name ingredients including Sunkist lemon, Kraft caramel and Heath candy bar pieces.

Betty Crocker's Hamburger Helper and its siblings hold more than 75% of the $450 million add-meat package dinner business. General Mills spent $4.3 million in media to roll out Skillet Chicken Helper dinners. Following the success of Ragu Foods' Chicken Tonight, it launched a line of add-to-meat Recipe Sauces.

Perhaps the most aggressive expansion in the Betty Crocker division has been in "wholesome" snacks. With a 54% share of the $450 million fruit snack category, General Mills continued to launch new products reflecting hot kid trends: Fruit by the Foot, SodaLicious and Gushers.

David Murphy, president of the Betty Crocker division, didn't go unnoticed. He was named president of the Big G division in January. Stephen Sanger, corporate exec VP, retains overall responsibility for the cereal business while overseeing Yoplait yogurt and international foods. Replacing Mr. Murphy as Betty Crocker president was Jeffrey Rotsch, former VP in that division.

Despite the recession, General Mills' restaurant sales grew 14.9% to $2.5 billion in fiscal 1992, as the company added 120 new units. The fast-growing Olive Garden increased its average unit sales 1% to $2.8 million and opened 71 new restaurants. Red Lobster's average unit volume fell 3% to $2.9 million. Its media buying was shifted to Saatchi & Saatchi Advertising, New York, from creative agency Grey Advertising.

HEADQUARTERS

General Mills/One General Mills Blvd./Minneapolis, Minn. 55440/Phone: (612) 540-2311.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Donald L. Knutzen, vp-mktg svcs; Robert J. Blake, dir-adv svcs, consumer foods.

CONSUMER FOODS: One General Mills Blvd./Minneapolis, Minn. 55440/Phone: (612) 540-2311. David D. Murphy, pres-Big G cereals; Stephen W. Warhover, pres-Gorton's; Roger W. Rumble, pres-foodservice; Jeffrey J. Rotsch, pres-Betty Crocker Products; Michael E. Cushmore, pres-Sperry div; Jon L. Finley, pres-Yoplait USA; Edward K. Bixby, pres-consumer foods sales.

Military, trade advertising: Bozell, Minneapolis. Eric Forslin, vp-acct super.

Bugles, Cinnamon Toast Crunch, Incredibites, Nature Valley Granola Bars, Nature Valley Granola Bites, Oatmeal Crisp, Pop Qwiz, Pop Secret, Whistles: Campbell-Mithun-Esty, Minneapolis. Les Mouser, sr vp-dir, acct svcs; Kate Richardson, mgmt super.

Bac-O's, Basic 4, Betty Crocker dessert mixes & potatoes, Betty Crocker Recipe Sauces, Bisquick, Crispy Wheats 'n Raisins, Golden Grahams, Hamburger Helper, Skillet Chicken Helper, Raisin Nut Bran, Red Band, Robin Hood flour and mixes, Suddenly Salad, Tuna Helper, Wheaties, Wheaties Honey Gold, Wondra, Yoplait: DDB Needham Worldwide, Chicago. Alan Alexander, exec vp-grp acct dir; Robert L. Klein, vp-mgmt rep.

Gorton's: LCF&L, New York. Lissie Deringer, acct super.

Foodservice: Carmichael Lynch, Minneapolis. Tom Costello, acct super.

Apple Cinnamon Cheerios, Berry Bears fruit snacks, Berry Berry Kix, Cheerios, Cheerios-to-Go, Clusters, Cocoa Puffs, Country Corn Flakes, Dunkaroos, Fiber One, Fruit by the Foot, Fruit Roll-Ups, Fruit Wrinkles, Fun Pack, Garfield fruit snacks, Honey Nut Cheerios, Kaboom, Kix, Lucky Charms, Monster cereals, Multi Grain Cheerios, Pudding Roll-Ups, Shark Bites fruit snacks, SodaLicious fruit snacks, Squeezit, Surf's Up! fruit snacks, Thunder Jets fruit snacks, Total, Total Corn Flakes, Total Raisin Bran, Triples, Trix: Saatchi & Saatchi Advertising, New York. Skip Sims, exec vp-exec mgmt dir.

Wheat Hearts, LaPina, pancake mix, Softasilk, Hispanic cereal adv: Casanova, Pendrill Publicidad, Irvine, Calif. Laura Marella, vp.

CHINA COAST: 1751 Director's Row/Orlando, Fla. 32809/Phone: (407) 850-5418. Blaine Sweat III, pres; Kress T. Muenzmay, pres-intl.

THE OLIVE GARDEN: 6100 Lake Ellenor Dr./Orlando, Fla. 32809/Phone: (407) 859-3044. Ronald N. Magruder, pres-The Olive Garden North America.

RED LOBSTER: 5900 Lake Ellenor Dr./Orlando, Fla./32809/Phone: (407) 851-0370. Jeffrey J. O'Hara, pres-Red Lobster North America.

Red Lobster, Olive Garden: Creative: Grey Advertising, New York. Jordan Rosuck, exec vp.

RANK: 3

General Motors Corp.

Detroit
Ad spending: **$1442.1** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	250,444	207,184	20.9
Sunday magazine	15,804	9,112	73.4
Newspaper	35,682	46,583	-23.4
Outdoor	6,390	3,963	61.3
Network TV	527,832	598,370	-11.8
Spot TV	109,902	136,478	-19.5
Syndicated TV	38,436	27,602	39.3
Cable TV networks	32,354	25,963	24.6
Network radio	17,185	25,223	-31.9
Spot radio	22,473	20,682	8.7
Measured media	1,056,501	1,101,161	-4.1
Unmeasured	385,600	401,900	-4.1
Total	1,442,101	1,503,061	-4.1
By top brands	**1991**	**1990**	**% chg**
Buick cars	155,214	158,696	-2.2
Chevrolet cars	140,487	164,349	-14.5
Chevrolet light trucks	122,507	138,919	-11.8
Oldsmobile cars	108,685	106,093	2.4
General Motors cars	108,149	129,331	-16.4
Pontiac cars	93,321	85,167	9.6
Saturn cars	88,601	31,501	180.5
Geo Metro & Tracker	58,749	67,098	-12.4
Cadillac cars	57,554	65,078	-11.6
General Motors auto parts	24,315	35,074	-30.7

SALES & EARNINGS ($ in millions)

Worldwide	**1991**	**1990**	**% chg**
Sales	123,056	124,705	-1.3
Earnings	(4,453)	(1,986)	NA
U.S.	**1991**	**1990**	**% chg**
Sales	83,973	86,967	-3.4
Net income	(7,087)	(4,570)	NA
Division sales	**1991**	**1990**	**% chg**
Automotive	94,607	96,906	-2.4
Financing & insurance	11,116	11,812	-5.9
Other	14,030	13,303	5.5

CORPORATE PROFILE

General Motors Corp., faced with mounting financial losses, launched an historic April 1992 shake-up of upper management.

To thwart further erosion in unit sales, GM early this month issued its own credit card offering cardholders a 5% rebate on the purchase of a new GM car or truck. It is spending up to $70 million to market the card.

In the coup, Lloyd Reuss, president, and Robert O'Connell, cfo, were demoted. John F. Smith Jr., formerly vice chairman in charge of international operations, replaced Mr. Reuss, and William Hoglund, formerly exec VP, GM's parts operation, replaced Mr. O'Connell.

Chairman Robert Stempel kept his position but was replaced as chairman of the board's executive committee by John Smale, former ceo of Procter & Gamble Co. and one of the leaders of the board's new activism.

GM's 1991 losses, the worst ever by any U.S. corporation, led it to the December 1991 bombshell announcement that it would shut 21 factories and shed 74,000 workers by 1995.

The company's 1991 U.S. vehicle market share was 35%, a loss of 0.5 share points from 1990. GM sold 4.3 million new cars and light trucks in 1991, a 12.5% decline from 1990.

Combined car-truck market shares for individual divisions in 1991 vs. 1990: Chevrolet, down 0.7 points to 18.1%; Buick, up 0.5 to 4.4%; Pontiac, down 0.6 to 4.2%; Oldsmobile, down 0.2 to 3.7%; GMC Truck, down 0.1 to 2.3%; and Cadillac, down 0.2 to 1.7%.

Through the first seven months of 1992, GM held a 35.3% share of the new-vehicle market. Its unit sales were up 2.5% from the same period a year earlier, to 2.7 million. The biggest surge came at Pontiac, which held a 4.6% market share, up 0.4 points.

Saturn Corp. had 1991 unit sales of 74,493 for a 0.6% share, and extended its share to 1.5% in the first seven months of this year based on cars sales of 117,715. Saturn has built a reputation for customer satisfaction, and has eliminated price haggling in dealerships by offering a set price.

Marketing personnel moves included the April appointment of Michael Losh to VP-group executive for North American vehicle sales and marketing. He had been VP-general manager, Oldsmobile. Philip Guarascio then moved from executive-in-charge of corporate marketing and advertising to general manager-marketing and advertising for North American Operations, reporting to Mr. Losh.

HEADQUARTERS

General Motors Corp./3044 W. Grand Blvd./Detroit, Mich. 48202/Phone: (313) 556-5000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Vincent Barabba, exec-in-charge, mktg rsch decision center.

NORTH AMERICAN OPERATIONS: 30009 Van Dyke Ave./Warren, Mich. 48090-9025/Phone: (313) 492-7141. J. Michael Losh, vp-grp exec, N. Amer vehicle sales & mktg; Philip Guarascio, genl mgr-mktg & adv; Michael Browner, genl dir-media oper; Luana Floccuzio, dir-adv; Donald Teasdale, dir-adv operations; James Kornas, dir-strategic mktg; Patrick Kemp, dir-natl mktg; Elizabeth Lazar, mgr-media operations; Denny Bolen, mgr-adv; Bernard Johnston, natl merch mgr; Shirley Young, vp-consumer mktg devel.

D'Arcy Masius Benton & Bowles, Bloomfield Hills, Mich. Ronald Monchak, mg dir.

N W Ayer, Detroit. Dannielle Colliver, pres.

The Mingo Group, New York. Samuel Chisholm, pres.

Lintas:Campbell-Ewald, Warren, Mich. Richard O'Connor, chmn.

McCann-Erickson Worldwide, New York. Sean Fitzpatrick, vice chmn.

BUICK MOTOR DIV.: 902 E. Hamilton Ave./Flint, Mich. 48550/Phone: (313) 236-5000. Edward Mertz, vp-gm; Robert Coletta, genl sales/svcs mgr; Darwin Clark, genl mktg mgr; Bruce Edwards, dir-strategic mktg; Jay Qualman Jr., genl dir-adv.

McCann-Erickson Worldwide, Troy, Mich. Richard Hill, sr vp-mgmt super.

CADILLAC MOTOR CAR DIV.: 2860 Clark St./Detroit, Mich. 48232/Phone: (313) 554-6112. John Grettenberger, vp-gm; Peter Gerosa, genl sales/svcs mgr; Peter Levin, dir-adv; Doug Comb, mgr-adv.

D'Arcy Masius Benton & Bowles, Bloomfield Hills, Mich. Alexander Morton III, exec vp-mgmt super.

CHEVROLET MOTOR DIV.: 30007 Van Dyke Ave./Warren, Mich. 48090-9065/Phone: (313) 556-5000. J.C. Perkins, gm; Robert Starr, genl sales/svcs mgr; Jeffrey Hurlbert, genl mktg mgr; Kurt Ritter, mktg mgr-trucks; Steve McAvoy, mktg mgr-pass car; Frank Raine, dir-area mktg; James Jandasek, mgr-passenger car adv; Mac Whisner, mgr-truck adv.

Lintas:Campbell-Ewald, Warren, Mich. Anthony Hopp, exec vp-acct dir.

GENERAL MOTORS ACCEPTANCE CORP.: 3044 W. Grand Blvd./Detroit, Mich. 48202/Phone: (313) 556-1020. Robert O'Connell, chmn; John Rines, pres; John Gibson, grp vp-N. Amer Operations; Keith Crutcher, vp-sales; Terrence Sullivan, vp-corp comm.

Lintas:Campbell-Ewald, Warren, Mich. Gerry Golinske, acct super.

GENERAL MOTORS SERVICE PARTS OPERATIONS: 3044 W. Grand Blvd./Detroit, Mich. 48202/Phone: (313) 556-5000. William Lovejoy, genl mgr; Leonard Decker, genl dir-sales svcs/mktg; Brent Snelson, dir-adv/sales promo.

Parts: D'Arcy Masius Benton & Bowles, Bloomfield Hills, Mich. John Greening, sr vp-mgmt super; **AC-Delco:** Lintas:Campbell-Ewald, Warren, Mich. Skip Drayton, sr vp-acct super.

GMAC MORTGAGE CORP.: 8360 Old York Road/Elkins Park, Pa. 19117-1590/Phone: (215) 881-1000. Geoffrey Thomas, pres-ceo; Michael Mangan, exec vp; Richard Gillespie, sr vp-pr/adv.

Lintas:Campbell-Ewald, Warren, Mich. Gerry Golinske, acct super.

GMC TRUCK DIV.: 31 E. Judson St./ Pontiac, Mich. 48342-2230/Phone: (313) 456-2100. Lewis Campbell, vp-gm; Raymond Rota, genl sales mgr; Frederick Cook, dir-mktg; Warren Christell, dir-adv/bus operations.

McCann/SAS, Troy, Mich. Candace Robbins, gm.

HUGHES AIRCRAFT CO.: 7200 Hughes Terrace/P.O. Box 45066/Los Angeles, Calif. 90045-0066/Phone: (310) 568-7200. Michael Armstrong, chmn-ceo; David Snyder, sr vp-mktg/intl; Lucius Gregg, staff vp-corp comms; Alma Gonzalez, mgr-corp adv.

Eisaman, Johns & Laws, Los Angeles. Dennis Coe, pres. Bernard Hodes Advertising, Los Angeles. Steve Petersen, sr vp-branch mgr.

OLDSMOBILE DIV: 920 Townsend St./Lansing, Mich 48921/Phone: (517) 377-5000. John Rock, vp-gm; D.E. Lahti, genl sales/svcs mgr; W. Knox Ramsey, genl mktg mgr; Karen Ebben, dir-consumer mktg; Robert Romero, strategic mktg mgr; Gerry Card, adv mgr; Jim Holland, sales promo mgr.

Leo Burnett USA, Southfield, Mich. G. Ted Jordan Jr., sr vp-client svcs dir.

PONTIAC DIV: One Pontiac Plaza/Pontiac, Mich. 48340/Phone: (313) 857-5000. John Middlebrook, vp-gm; Elwood Schlesinger, genl sales/svc mgr; Lynn Myers, genl mktg mgr; James Panaretos, sales promo mgr; Michael Wright, adv/consumer mktg mgr.

D'Arcy Masius Benton & Bowles, Bloomfield Hills, Mich. O. Mark Gjovik, exec vp-grp acct dir.

SATURN CORP.: 1420 Stephenson Highway/Troy, Mich. 48007-7025/Phone: (313) 524-5721. Richard LeFauve, pres; Donald Hudler, vp-sales/svc/mktg; Thomas Shaver, dir-mktg svcs.

Hal Riney & Partners, San Francisco. Hal Riney, chmn-ceo.

RANK: 59

Gillette Co.

Boston

Ad spending: **$182.5 million**

U.S. AD SPENDING ($ in thousands)

By media	**1991**	**1990**	**% chg**
Magazine	8,238	17,354	-52.5
Sunday magazine	3	0	NA
Newspaper	2,070	1,551	33.5
Outdoor	0	29	NA
Network TV	58,943	45,867	28.5
Spot TV	6,271	3,079	103.7
Syndicated TV	11,871	7,338	61.8
Cable TV networks	5,428	6,138	-11.6
Network radio	0	575	NA
Spot radio	270	199	36.0
Measured media	93,094	82,128	13.4
Unmeasured	89,400	73,300	22.0
Total	182,494	155,428	17.4
By top brands	**1991**	**1990**	**% chg**
Gillette shaving products	39,411	32,962	19.6
Oral-B	15,191	8,502	78.7
Right Guard deodorants	14,836	8,709	70.4
Braun shaving equipt	10,436	11,420	-8.6
Soft & Dry deodorants	8,257	8,343	-1.0

SALES & EARNINGS ($ in millions)

Worldwide	**1991**	**1990**	**% chg**
Sales	4,684	4,344	7.8
Earnings	427	368	16.2
U.S.	**1991**	**1990**	**% chg**
Sales	1,496	1,433	4.4
Profit from operations	277	262	5.6
Division sales	**1991**	**1990**	**% chg**
Blades & razors	1,750	1,571	11.4
Toiletries & cosmetics	947	941	0.6
Stationery prods	460	469	-1.8
Braun prods	1,216	1,098	10.7
Oral-B prods	308	263	17.2
Other	3	3	-15.6

CORPORATE PROFILE

Gillette Co. is sharply increasing U.S. media spending, particularly to build the Sensor shaving system that now has a companion product for women.

Spending will expand further in 1993 as new products come out of core businesses, including deodorants and antiperspirants, and support grows for new products, Oral B plaque remover and Oral B Indicator toothbrush.

New-product introductions in the U.S. this year included the $17 million intro-

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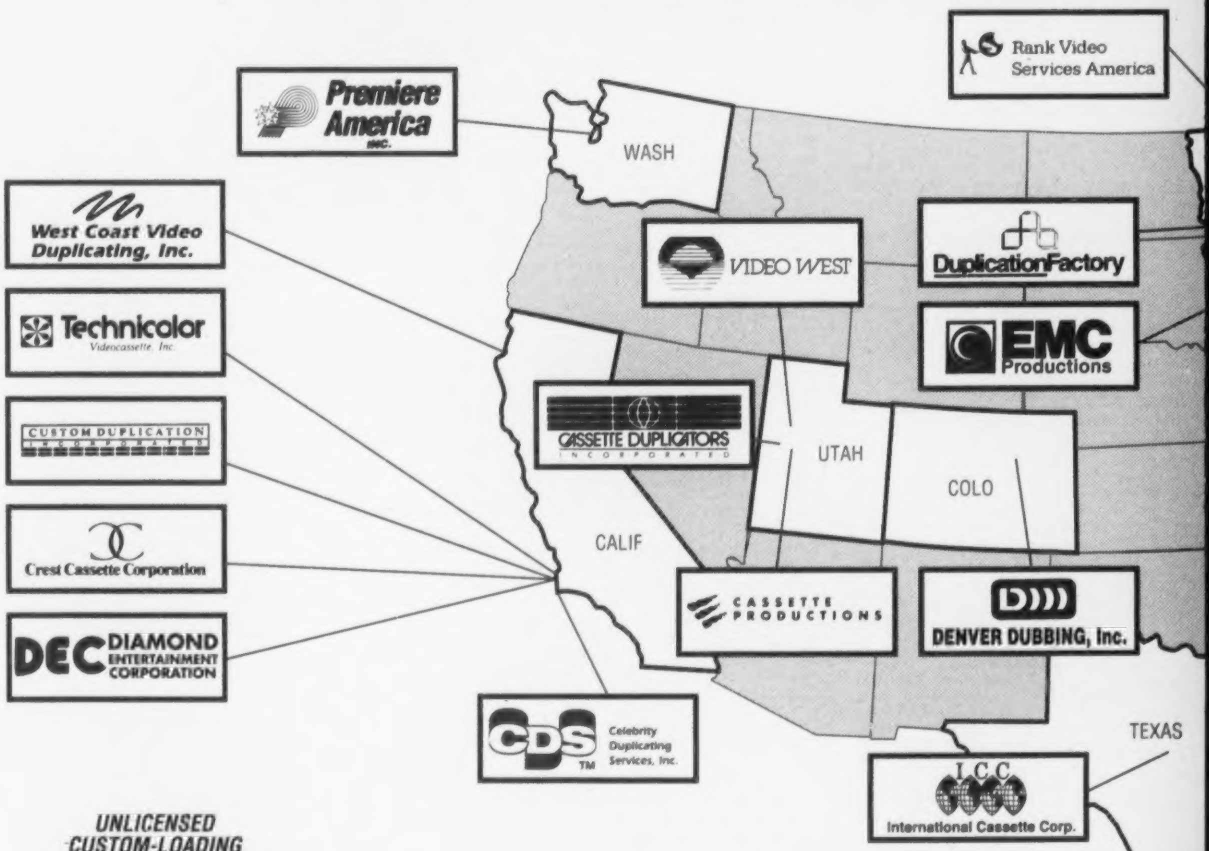
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duction of the Braun Flex Control shaver that adjusts to facial contours. The brand ranks second in the $373 million U.S. electric shaver market with a 19% share. North American Philips Corp.'s Norelco is the leader at 50%.

Launched in January 1990, Sensor held an estimated 15% share of the $900 million-plus wet-shave market by the end of 1991, up from 9.3%. Media spending behind the brand rose 20% in 1991 to $37.8 million, according to LNA/Arbitron Multi-Media Service. The company supported in May with a coupon mailing of 5 million pieces.

This July Gillette introduced Sensor for Women with a $14 million ad budget. Gillette is urging female consumers to upgrade from disposable razors. About 70% of women buy disposables. But to protect its stake in the disposables segment, Gillette boosted its Daisy brand with $2 million in media and extended the line to include Daisy Slim with an ultra-thin shaving head.

The company is saving its biggest introduction for yearend when it will unveil a men's toiletry line under the Gillette name. Marketing support is estimated in excess of $45 million for the line in 1993.

In 1991, Gillette expanded the White Rain haircare line with a shampoo plus conditioner called White Rain Plus.

The company also is boosting spending by 35% on Soft & Dri and by 15% on the Right Guard brand. Non-aerosol Right Guard Sports Stick has helped boost the Right Guard brand's share of market. Total Gillette share in the category is 15.4%, according to Towne-Oller & Associates.

HEADQUARTERS

Gillette Co./Prudential Tower Building/Boston, Mass. 02199/Phone: (617) 421-7000

PERSONNEL, BRANDS, AGENCIES

ADVERTISING SERVICES DIV: Prudential Tower Building/Boston, Mass. 02199/Phone (617) 421-7000. Michael Nadelberg, vp-mktg svcs; Louise Baranowski, mgr-media buying; Donald McAllister, mgr-media planning; Robert Evans, dir-promo svcs; John Walp, dir-adv prodn.

NORTH ATLANTIC GROUP: Prudential Tower Building/Boston, Mass. 02199/Phone: (617) 421-7000. Marketing Personnel: Peter Hoffman, Carole Johnson, Brian McFarland, vps-bus mgmt.

SHAVING USA: One Gillette Park/Boston, Mass. 02127/Phone: (617) 463-3000. Robert Leger, vp-sales & mktg; James Tafferin, dir-mktg.

Sensor, Atra, Trac II, Good News and Daisy: BBDO Worldwide, New York. Simon Marlowe, exec vp-sr mgmt rep; Michael Paxton, sr vp-mgmt rep; and Barry Schweig, sr vp-mgmt rep.

PERSONAL CARE USA: Prudential Tower Building/Boston, Mass. 02199/Phone: (617) 421-7000. Bruce Swinsky, vp-sales and mktg; Charles Honnet, dir-mktg.

Right Guard: N W Ayer, New York. David Gantman, sr vp-exec acct dir; Alan Reisberg, vp-mgmt super.

Soft & Dri and Dry Idea: BBDO, New York. Janet Presley, exec vp-dir acct.

STATIONERY PRODUCTS GROUP: Prudential Tower Building/Boston, Mass. 02199/Phone: (617) 421-7000. Stephen White, vp bus strategy, new prods/acquisitions; Robert Warren, dir-mktg.

Paper Mate, Liquid Paper, and Waterman: McCann-Erickson Worldwide, New York. David Weiss, vp-grp head dir.

ORAL-B LABORATORIES: One Lagoon Dr./Redwood City, Calif. 94065/Phone: (415) 598-5000. Edward Shirley, gm-consumer prod div.

Oral-B toothbrushes, dental floss and children's toothpaste: BBDO, Los Angeles. Terry Bowman, sr vp-mgmt super.

BRAUN: 66 Broadway, Route 1/Lynnfield, Mass. 01940/Phone: (617) 592-3300. Richard Cantwell, dir-mktg; Robert Cronon, mktg mgr; Alex McKinnon, Alex Resley, prod mgrs.

Braun beverage products, electric shavers, oral care appliances, personal care appliances, clocks and household products: Lowe & Partners, New York. Dan O'Donnell, sr vp-mgmt super; Denise Linden, acct super.

RANK: 77

Goodyear Tire & Rubber Co.

Akron, Ohio

Ad spending: **$130.7** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	14,568	14,880	-2.1
Sunday magazine	0	4,073	NA
Newspaper	321	1,832	-82.5
Outdoor	119	36	234.2
Network TV	20,175	29,473	-31.5
Spot TV	1,150	4,044	-71.6
Syndicated TV	1,116	533	109.4
Cable TV networks	1,971	1,771	11.3
Network radio	15,425	14,223	8.5
Spot radio	19	8	141.0
Measured media	54,863	70,872	-22.6
Unmeasured	75,800	107,800	-29.7
Total	130,663	178,672	-26.9
By top brands	**1991**	**1990**	**% chg**
Goodyear tires	26,888	57,990	-53.6
Goodyear service store	26,139	11,109	135.3

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	10,907	11,273	-3.2
Earnings	97	38	152.2
U.S.	**1991**	**1990**	**% chg**
Sales	6,231	6,460	-3.5
Operating income	423	327	29.3
Division sales	**1991**	**1990**	**% chg**
Tires, related	8,959	9,215	-2.8
General products	1,917	2,027	-5.4
Oil transportation	31	30	3.7

CORPORATE PROFILE

Goodyear Tire & Rubber Co., the world's second-largest tire marketer behind Groupe Michelin of France, by mid-1992 showed signs of reversing a stagnant 1991 in which it posted its first loss since 1932.

By second quarter 1992, cost-cutting and intense marketing had boosted earnings fivefold and represented a major triumph for Chairman Stanley C. Gault.

He has emphasized developing and marketing new tire products to boost Goodyear's market share in the $50 billion-plus worldwide tire market. The company's name-brand share of the U.S. replacement car-tire category has fallen more than 3 points since 1986, to 15.4%.

In recent months, Goodyear, which had sold its tires primarily through company-owned retail stores, signed agreements with Sears, Roebuck & Co. and Kmart to carry Goodyear and Kelly brands, respectively. By July, the company reported that the increase in dealer business, combined with new distribution channels, accounted for a market share increase of nearly 1 point, representing about 1.5 million tires.

While discontinuing the low-end, non-Goodyear brand business, the company is launching new products. Aquatred, introduced in fall 1991 and designed to handle wet roads, is part of an estimated $50 million national ad program to back Goodyear brand tires. The company said national advertising, about one-third of its $150 million budget, will climb 30% in 1992.

Goodyear also doubled the funds set aside for its cooperative ad program so dealers could capitalize on the company's national advertising.

The company appointed Roger Zwingler to the new post of director of marketing communications for the North American Tire Division, a position designed to bring together brand and retail advertising, sales promotion, identification and in-store merchandising.

The company launched its 1992 ad effort during the Winter Olympics using commercials that showed Aquatred tires transform from water to rubber. Also making their debut on Olympics broadcasts were spots for the high-performance Eagle GS-C, the on/off-road Wrangler GS-A tires and the Invicta GFE, designed to aid the environment by reducing fuel consumption by 4%.

HEADQUARTERS

Goodyear Tire & Rubber Co./1144 E. Market St./Akron, Ohio 44316/Phone: (216) 796-2121.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: J. Fiedler, exec vp-N. American Tires; B.D. Robbins, vp-mktg, N. Amer Tires; A.R. Eastwood, gm-passenger tires; W.M. Hopkins, gm-light truck tires; B.L. Kinnamon, gm-commercial truck tires; J.R. Montgomery, dir-mktg strategy planning/rsch; R.L. Zwingler, dir, mktg comms; R.L. Gray, mgr-creative svcs; J.A. Neawedde, adv mgr, passenger tires; P.F. Suloff, adv mgr-light truck and farm tires; R.S. True, mgr-retail adv/sales promos; J.P. Boland, mgr-field comms; D. Hanni, dir-intl adv.

General products, retail promotion assignments: Malone Advertising, Akron, Ohio. Fred Bidwell, pres.

Goodyear tires-broad market, Eagle High Performance tires, Wrangler Truck tires, race enthusiast ads, commercial truck & farm tires, natl retail adv & svcs: J. Walter Thompson USA, Detroit. Steve Stepanek, vp-mgmt super, retail/outlet.

Goodyear-newspaper advertising & associated promotions: Hitchcock-Fleming & Associates, Akron, Ohio. Jack DeLeo, sr vp.

KELLY SPRINGFIELD TIRE CO. 12501 Willow Brook Road/Cumberland, Md. 21502-2599/Phone: (301) 777-6000.

Jack Florin, dir-adv; Sharon Moore, mgr-retail promo; William C. Fordham, mgr-identification merch; Steve Ketterman, mgr-dealer adv.

Kelly tires: Marcus Advertising, Cleveland, Ohio. Don Campbell, exec vp.

Associate brands: Ira Thomas Associates, Youngstown, Ohio. Mark Bachmann, bus devel dir.

RANK: 6

Grand Metropolitan

London

Ad spending: **$744.7** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	83,087	76,706	8.3

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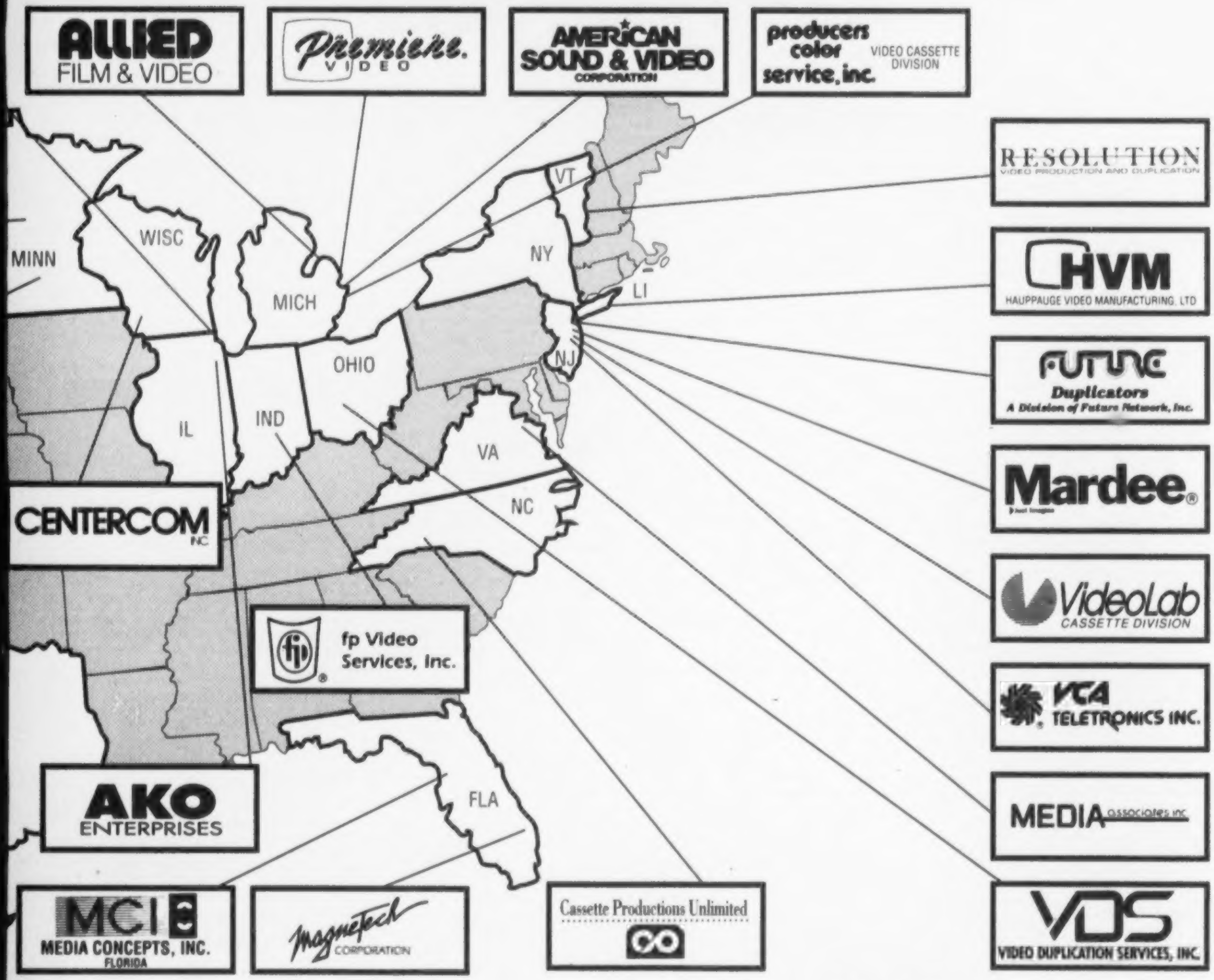
ALLIED FILM & VIDEO
Premiere VIDEO
AMERICAN SOUND & VIDEO CORPORATION
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FUTURE Duplicators A Division of Future Network, Inc.
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MEDIA associates inc
VDS VIDEO DUPLICATION SERVICES, INC.
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MagneTech CORPORATION
MCI MEDIA CONCEPTS, INC. FLORIDA
AKO ENTERPRISES
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VICTOR COMPANY OF JAPAN, LIMITED
8-14, NIHONBASHI-HONCHO 4-CHOME, CHUO-KU, TOKYO 103, JAPAN

Top 25 newspaper advertisers

Rank	Advertiser	Newspaper spending 1991	1990	% chg
1	**May Department Stores Co.**	$155.2	$218.2	-28.9
2	**R.H. Macy & Co.**	139.2	160.1	-13.0
3	**Federated Department Stores**	91.8	134.5	-31.7
4	**Sears, Roebuck & Co.**	88.7	136.8	-35.2
5	**Circuit City Stores**	73.3	41.3	77.7
6	**Carter Hawley Hale Stores**	70.5	72.8	-3.2
7	**AMR Corp.**	68.7	60.7	13.2
8	**American Stores Co.**	57.2	69.6	-17.8
9	**Delta Air Lines**	53.6	32.9	63.0
10	**Dayton Hudson Corp.**	46.0	106.2	-56.7
11	**Montgomery Ward & Co.**	44.1	82.1	-46.3
12	**Vons Cos.**	42.2	27.0	56.2
13	**Kmart Corp.**	39.3	80.7	-51.3
14	**General Motors Corp.**	35.7	46.6	-23.4
15	**J.C. Penney Co.**	33.6	70.6	-52.4
16	**Time Warner**	33.1	47.5	-30.4
17	**Sony Corp.**	30.7	36.9	-16.8
18	**Texas Air Corp.**	29.9	72.8	-58.9
19	**American Express Co.**	29.3	17.7	65.5
20	**NWA Inc.** (Northwest Airlines)	28.6	20.7	38.2
21	**AT&T Co.**	28.3	43.9	-35.6
22	**Ralphs Grocery Co.**	28.2	18.3	53.8
23	**Daimler-Benz AG**	27.9	21.6	28.9
24	**Ford Motor Co.**	27.2	25.9	4.9
25	**Citicorp**	24.2	18.5	30.6

Notes: Dollars are in millions. **Source:** LNA/Arbitron. See Page 72 for methodology.

By media	1991	1990	% chg
Sunday magazine	4,092	4,083	0.2
Newspaper	2,159	6,437	-66.5
Outdoor	7,656	8,443	-9.3
Network TV	103,273	183,069	-43.6
Spot TV	65,122	58,825	10.7
Syndicated TV	42,502	45,823	-7.2
Cable TV networks	11,590	10,326	12.2
Spot radio	8,179	8,648	-5.4
Measured media	327,660	402,359	-18.6
Unmeasured	417,000	480,800	-13.3
Total	744,660	883,159	-15.7
By top brands	**1991**	**1990**	**% chg**
Burger King restaurants	133,589	177,678	-24.8
Pillsbury baking mixes	30,428	31,248	-2.6
Pearle Vision centers	26,840	44,199	-39.3
Absolut vodka	16,692	14,047	18.8
Pillsbury breads & rolls	14,343	15,737	-8.9
Green Giant vegetables	12,363	14,050	-12.0
Smirnoff vodkas	8,662	9,608	-9.8
Haagen-Dazs ice cream	7,759	2,558	203.3
J&B scotch whiskies	7,509	9,115	-17.6
Bailey's Irish Cream	6,410	5,829	10.0

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	15,545	16,616	-6.4
Earnings	1,711	1,626	5.3
U.S.	**1991**	**1990**	**% chg**
Sales	7,878	8,025	-1.8
Profit	919	835	10.0
Division sales	**1991**	**1990**	**% chg**
Food	5,377	5,303	1.4
Drinks	4,309	4,008	7.5
Retailing	3,645	3,665	-0.6

CORPORATE PROFILE

Grand Metropolitan's plum award of $200 million in consolidated network TV buying to D'Arcy Masius Benton & Bowles, New York, turned into a prune in 1991. The marketer promptly slashed network TV spending 43.6% to $103.3 million.

The cut was part of an overall 18.6% decline in media spending by Grand Met. The biggest hits were felt at Alpo Petfoods and Pearle Vision Centers, where spending fell 64% and 39%, respectively, although media backing grew 176% at Haagen-Dazs Co. as it embarked on its first U.S. network TV ad campaign.

Haagen-Dazs introduced larger sizes of its frozen yogurt line of four yogurt-based snacks, and Extraas, superpremium ice creams with exotic mix-ins. It also was aiming for pan-European coverage by the end of the summer.

Alpo lost the No. 1 dog food position to rival Kal Kan Foods' Pedigree in 1991 as it spent only $3.5 million in media on dogs, down 51.4%, while preferring cats ($6.3 million in media, down 70.5%), according to LNA/Arbitron Multi-Media Service. Alpo's share of the $4.7 billion pet food market was 9.5% for the year ended Feb. 22, down slightly, according to Nielsen Marketing Research.

Alpo has pledged $90 million for 1992. In January, it named Kevin Martin president, replacing H. Robert Hawthorne, who's now chief operating officer of the Pillsbury Baked Goods division.

Pearle kept its No. 1 rank during the recession but suffered a 20.4% drop in sales to $475 million for the fiscal year ended Sept. 30, 1991. In early 1992, Pearle hired Ron Nykiel as senior VP-brand strategy and chief marketing officer, who subsequently called an agency review. The $42 million account was divided three ways: Wyse Advertising, Cleveland, got image and brand; GSD&M, Austin, Texas, media buying and planning; and MARC Advertising, Pittsburgh, local co-op print buying.

At Pillsbury, the big success is Green Giant, which late last year passed longtime rival Kraft General Foods' Bird's Eye as the No. 1 marketer in frozen vegetables with an 18.8% share of the $1.9 billion category vs. 16.1% for Bird's Eye, according to Information Resources Inc.

Burger King Corp. named Sidney J. Feltenstein exec VP-brand strategy in late 1991, replacing Gary Langstaff, who resigned in April.

Burger King's ad spending fell 25% in 1991, including a near-50% cut in network TV, according to LNA. The No. 2 fast-food chain held a 16.9% share of the fast-food market in 1991, down from 17.1%, according to *Nation's Restaurant News*.

Heublein's Smirnoff vodka fell 7% in case sales in 1991, a year in which only two of the nation's top 10 liquor brands had gains, according to John C. Maxwell Jr., analyst at Wheat, First Securities.

In July, Smirnoff named Lowe Group to handle a global ad assignment worth up to $20 million; McCann-Erickson Worldwide continues to handle U.S. ads.

Case sales for Carillon Importers' Absolut vodka rose 2.6% in 1991. The Absolut line drew $16.7 million in media, up 19.3%.

HEADQUARTERS

Grand Metropolitan/20 St. James Square/SW1Y4RR/London, England. Grand Metropolitan/200 S. Sixth St./Minneapolis, Minn. 55402/Phone: (612) 330-4966.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Ian A. Martin, chmn; Robert C. Lowes, exec vp-cfo.

ALPO PETFOODS: 2050 Pope Rd./Allentown, Pa. 18104/P.O. Box 25100/Lehigh Valley, Pa. 18002-5100/Phone: (215) 395-3301. Kevin Martin, pres-Alpo; Kevin Murphy, sr vp-mktg/sales; George Mullinix, mktg dir.

Alpo canned & dry dog food, Alpo Dinner canned & dry dog food, Alpo Jerky Bits, Alpo Light canned dog food, Alpo puppy food, Alpo Snaps treats, Alpo stew biscuits dog food, Bi-Lo dog biscuits, Beef Bites treats, Tabby cat food: Weightman Inc., Philadelphia. Paul Burger, mgmt super.

BURGER KING CORP.: 17777 Old Cutler Rd./Miami Fla. 33157/Phone: (305) 378-7011. Fredy M. Dellis, pres-Burger King Intl; Barry Conrad, coo-Burger King USA; Sidney J. Feltenstein Jr., exec vp-brand strategy; Denis Hitchmough, media dir.

Burger King brand identity: D'Arcy Masius Benton & Bowles, New York. Roy Bostock, pres.

Burger King brand retailing: Saatchi & Saatchi Advertising, New York. Edward L. Wax, ceo; Harvey Hoffenberg, exec vp.

PILLSBURY FOODS: Pillsbury Center/200 S. Sixth St./Minneapolis, Minn. 55402/Phone: (612) 330-4966. Paul S. Walsh, div ceo; Robert Hawthorne, coo; Craig Evanich, vp-Pillsbury Brands; Larry Wheeler, vp-Pizza Brands; Peter Thompson, div ceo, Haagen-Dazs Ice Cream; Michael J. Paxton, pres-ceo, Haagen-Dazs Ice Cream; Linda Keene, vp-mktg svcs; Greg Lincoln, media dir.

Cakes/frosting mixes, Green Giant products, refrigerated products, Hungry Jack potatoes/pancakes, Pillsbury microwave products, Totino's pizza, Jeno's pizza: Leo Burnett USA, Chicago. John Miller, sr vp-grp acct dir. Campbell-Mithun-Esty, Minneapolis. Steve Gordon, sr vp-mgmt super. Foote, Cone & Belding, San Francisco. Becky Saeger, sr vp-grp mgmt super. UniWorld Group, New York. Mark Robinson, vp-acct super.

Haagen-Dazs: BBDO Worldwide, New York. Jayne Evans, acct dir.

PEARLE: 2534 Royal Lane/Dallas, Texas 75229/Phone: (214) 277-5000. Ron Nykiel, sr vp-mktg; George Williams, vp-field mktg; Bob Nance, vp-mktg svcs.

Pearle Vision Centers: GSD&M, Austin, Texas. Keith Glen, acct super. Wyse Advertising, Cleveland. James Hunt, exec vp-acct mgmt. MARC Advertising, Pittsburgh. John Harpur, sr vp-media dir; Ken Brown, vp-mgmt super; Marilyn Nicholson, sr acct super; Elizabeth Hayes, asst acct exec.

PADDINGTON CORP: One Parker Plaza/Fort Lee, N.J. 07024/Phone: (201) 592-5700. G. William Seawright, pres-ceo; Roger Slone, sr vp-mktg; Keith Greggor, brand dir-Bailey's Original Irish Cream; Mark Teasdale, brand dir-J&B; Don Van Wart, brand mgr-Malibu; Jamie Friedman, brand mgr-Amaretto di Saronno; John Skavlem, brand mgr-Sambuca Romana/Metaxa/Singleton.

Bailey's Original Irish Cream liqueur, Sambuca Romana, Malibu Rum, Rumple Minze schnapps, [illegible]: Geer, DuBois, New York. Justin Parks, exec vp-grp acct dir.

Amaretto di Saronno, J&B rare scotch, Knockando scotch, Metaxa brandy: Grace & Rothschild, New York. Regis Albrecht, mgmt super.

CARILLON IMPORTERS: 500 Frank W. Burr Blvd./Teaneck, N.J. 07666-6897/Phone: (201) 836-7799. Michel Roux, pres-ceo; Dick McEvoy, sr vp-mktg/sales; Ernie Capria, vp-dir, mktg svcs; Pamela Taylor, dir-pr.

Absolut vodka, Absolut Peppar, Absolut Citron, Bombay gin, Fernet Branca, Grand Marnier, Plat D'Or wine: TBWA, New York. Richard Lewis, Brian Barry, vps-mgmt supers.

HEUBLEIN INC.: 16 Munson Road/Farmington, Conn. 06034-0388/Phone: (203) 231-5000. Robert M. Furek, ceo; David Eickholt, John G. Martin, Bruce McDonnell, Ralph A. Hart, div mktg vps; Larry Challacomb, Fine Wines Div. mktg vp; Charles Wheeler, dir-adv svcs, Judi Hoye, dir-mktg svcs.

Black Velvet Canadian whisky, Smirnoff vodka, The Famous Grouse scotch whisky, Yukon Jack Canadian liqueur: McCann-Erickson Worldwide, New York. Rob McKinley, mgmt super.

Almaden wines, Almaden Blossom Hill, Christian Bros. wines, Finlandia vodka, Heublein Cocktails, Inglenook wines, Jose Cuervo tequila, Lancers wine, Mouton Cadet wines, Truffles Liqueur de Chocolat: Goodby, Berlin & Silverstein, San Francisco. Colin Probert, pres.

Christian Bros. brandy: Waring & LaRosa, New York. Larry Weisberg, pres.

Hispanic adv: Smirnoff vodka, Lancers wine: UniWorld Group, New York. Winston Cooper, vp-mgmt super.

Black adv: Smirnoff vodka: UniWorld Group, New York. Winston Cooper, vp-mgmt super.

RANK: 89

Hallmark Cards

Kansas City, Mo.
Ad spending: **$121.8** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	9,429	2,878	227.6
Sunday magazine	7,960	6,445	23.5
Newspaper	4,040	3,616	11.7
Outdoor	379	1	NA
Network TV	40,865	56,628	-27.8
Spot TV	3,379	6,317	-46.5
Syndicated TV	5,223	8,877	-41.2
Cable TV networks	573	658	-12.9
Network radio	0	1,552	NA
Spot radio	370	33	NA
Measured media	72,217	87,005	-17.0
Unmeasured	49,600	59,800	-17.1
Total	121,817	146,805	-17.0
By top brands	**1991**	**1990**	**% chg**
Hallmark stationery	59,101	71,641	-17.5
Hallmark Christmas ornament	6,065	7,118	-14.8

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	2,500	2,500	0.0

CORPORATE PROFILE

Hallmark Cards is fortifying its leading 45% market share in the $5.5 billion greeting card industry despite little growth in the business as a whole and competition from some new, smaller players.

Hallmark's retail store network gives it a power base not available to No. 2 American Greetings and No. 3 Gibson Greetings, both of which are having slightly more trouble building sales. One area of growth has been in holiday-related merchandise. This year, Hallmark is adding new products to its Christmas decorating and tree-trimming supplies. It has done well with Keepsake ornaments.

In December, Hallmark introduced its first-ever guidebook to celebrating the holidays, the 96-page "Treasured Traditions" published by Meredith Publishing Services. A new version will be out this year.

To enhance its existing array of Spanish-language cards, in 1991 Hallmark entered a marketing partnership with Paramount Cards of Pawtucket, R.I., to produce a new line of Hispanic greeting cards called Primor. Hallmark reduced its media spending in 1991 by 17%, taking it from broadcast. Print grew 66% to $21.3 million, according to LNA/Arbitron Multi-Media Service.

Hallmark's Binney & Smith division introduced washable crayons, which can be washed off of most surfaces like walls and fabric.

Hallmark subsidiary Crown Media purchased in 1991 the cable TV system, Cencom Cable Associates, which has more than 700,000 subscribers. Last June, Hallmark agreed to sell the Univision Spanish-language TV network to a private investor group for $550 million; the transaction awaits Federal Communications Commission approval.

In February, Hallmark formed Signboard Hills Productions, a broadcast and performance production subsidiary to develop and produce TV and theatrical projects.

HEADQUARTERS

Hallmark Cards/2501 McGee St./Kansas City, Mo. 64108/Phone: (816) 274-5111.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Robert Firnhaber, grp vp-Hallmark brand; Laurie Beeson, vp-mktg, Hallmark brand; Lanny Julian, grp vp-Ambassador brand; Homer Evans, vp-Hallmark cards specialty prods div; Mark Schwab, div vp-Ambassador prod devel; Don Fletcher, Hallmark vp-Hallmark brand prod devel; Brad Moore, div vp-adv/promo; Ira Stolzer, adv dir; vp sales/retail devel-not yet named.

Hallmark natl adv: Leo Burnett USA, Chicago. Tom Dickson, sr vp-acct dir.

Hallmark retailer adv progs, Ambassador cards: Valentine-Radford, Kansas City, Mo. Greg Kirsch, vp-acct grp super.

RANK: 54

Hasbro Inc.

Pawtucket, R.I.
Ad spending: **$201.4** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	7,689	5,320	44.5
Network TV	53,534	52,898	1.2
Spot TV	52,466	64,843	-19.1
Syndicated TV	31,840	24,420	30.4
Cable TV networks	15,561	11,279	38.0
Spot radio	41	24	67.9
Measured media	161,131	158,784	1.5
Unmeasured	40,300	36,400	10.7
Total	201,431	195,184	3.2
By top brands	**1991**	**1990**	**% chg**
Hasbro toys	40,657	36,319	11.9
Milton Bradley games	36,365	27,341	33.0
Playskool toys	20,987	23,941	-12.3
Kenner toys	14,122	28,485	-50.4
Tonka toys	13,508	8,176	65.2
Coleco toys	9,536	8,791	8.5
Parker Bros. games	6,479	8,048	-19.5

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	2,141	1,520	40.9
Earnings	82	89	-8.5
U.S.	**1991**	**1990**	**% chg**
Sales	1,273	939	35.7
Operating profit	120	64	89.1

CORPORATE PROFILE

Like most toy companies in the 1980s, Hasbro feverishly developed new products in search of the ever elusive megahit, but its pace seems to have calmed down as it focuses more on building existing brands.

With its classic G.I. Joe figure, Playskool's Mr. Potato Head and Milton Bradley's long-term games including Yahtzee and Life, Hasbro continues to win solid sales by continually updating the products and their advertising.

Hasbro has also streamlined product lines of the new brands it has acquired.

Since acquiring Tonka, Kenner and Parker Bros., gained through the purchase of Tonka Corp. last year, Hasbro has been consolidating the acquired companies' functions and operations, closing down several facilities and eliminating many jobs in 1991 and 1992, including 370 at Parker Bros. and 240 at Tonka.

The Tonka brand has been dramatically scaled down from a disorganized array of products including dolls and activity toys; now it consists of the classic Mighty Tonka Truck, large-size preschool vehicles and a miniature vehicle line, all of which are getting TV support.

Kenner's hit Baby Alive doll has been expanded into a full line of products called World of Baby Alive, which includes the new Puppy Alive and an array of accessories. Kenner painting and craft activity toys also have new products. Its Easy Bake Oven has had brisk sales.

Parker Bros. also got a face lift and now includes a new line of travel games, mirroring the travel game success of Hasbro's Milton Bradley games division. Manufacturing for both gamemaking units has been combined at the Milton Bradley plant.

Cabbage Patch Kids, the doll line Hasbro rescued from the brink of oblivion in a 1989 acquisition, in its ninth year includes 32 items from newborns to special-feature dolls and accessories.

Hasbro's hottest new products in 1991 were its Nerf Bow 'N' Arrow, Baby Wanna Walk and Yo-Yo My Walking Kitty, each of which built on brands or concepts that had been successful in previous years.

Main recipients of media support in 1991 were G.I. Joe, at $10.4 million in TV, and World Wrestling Federation action figures, at $5.3 million, according to LNA/Arbitron Multi-Media Service. Overall, Hasbro spent $161.3 million in measured media in 1991, slightly up from 1990.

Hasbro's clout in the international toy market is also increasing; in 1991, about 40% of its sales came from overseas, and that portion is continuing to grow.

HEADQUARTERS

Hasbro/1027 Newport Ave./Pawtucket, R.I. 02861/Phone: (401) 431-8697.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: John Gildea, vp-licensing and creative design; Debbie Boyd, vp-media; Wayne Charness, vp-corporate comms; Gary Serby, dir-pr; Amy Deemer, dir corp exhibits and merch display; Pat Schmidt, dir of promo; Kate Stanuch, rsch dir

HASBRO DIV: 1027 Newport Ave./Pawtucket, R.I. 02861/Phone: (401) 431-8697. Larry Bernstein, pres; Duncan Billing, sr vp-mktg; Ron Kos, sr vp-mktg svcs; Kirk Bozigian, vp-mktg-boys' toys; Jeanie Olsen, vp mktg-girls' toys; Tom Prichard, vp-Cabbage Patch Kids.

Hasbro girls' & boy's products, Tonka products: Griffin Bacal, New York. David Biebelberg, sr vp grp dir.

Cabbage Patch Kids, Hasbro girls' and boys' toys: Jordan, McGrath, Case & Taylor, New York. Don Weir, exec vp

PLAYSKOOL DIV: 1027 Newport Ave./Pawtucket, R.I. 02861/Phone: (401) 431-8697. Dan Owen, pres; Sharon Hartley, sr vp-mktg; Gina Beebe, vp-mktg; Greg Miller, assoc vp-mktg.

Playskool toys broadcast: Griffin Bacal, New York. Robert Kantor, sr vp-grp dir.

Playskool toys print adv: Kidvertisers, New York. Larry Nunno, acct dir.

PLAYSKOOL BABY: 1027 Newport Ave./Pawtucket, R.I. 02861/Phone: (401) 431-8697. Jonathan Breiter, sr vp-mktg.

Playskool baby products: Griffin Bacal, New York. Jill Baldauf, vp-mgmt super. Kidvertisers, New York. Larry Nunno, acct dir.

MILTON BRADLEY DIV: 443 Shaker Road/East Longmeadow, Mass. 01028/Phone: (413) 525-6411. Dave Wilson, pres; Dale Siswick, sr vp-mktg; Bill Dohrmann, vp-mktg; Cathy Meredith, assoc vp-mktg svcs.

Milton Bradley games: Griffin Bacal, New York. Arnie Berger, sr vp-grp dir.

KENNER PRODUCTS: 615 Elsinore Place/Cincinnati, Ohio 45202/Phone: (513) 579-4000.

Kenner Products: Grey Advertising, New York. Steve Dammers, Lou Maloof, exec vps-mgmt reps. Griffin Bacal, New York. Robert Horne, sr vp-grp dir.

PARKER BROS.: 50 Dunham Road/Beverly, Mass. 01915/Phone: (508) 927-7600.

Parker Bros.: Grey Advertising, New York. Grey Advertising, New York. Steve Dammers, Lou Maloof, exec vps-mgmt reps.

RANK: 26

H.J. Heinz Co.

Pittsburgh
Ad spending: **$403.1** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	7,852	15,938	-50.7
Sunday magazine	1,958	1,919	2.1
Newspaper	3,852	7,321	-47.4
Outdoor	192	60	220.0
Network TV	21,634	53,256	-59.4
Spot TV	22,810	29,505	-22.7
Syndicated TV	8,856	16,531	-46.4
Cable TV networks	1,924	2,259	-14.8
Network radio	2,639	5,261	-49.8
Spot radio	5,351	2,242	138.7
Measured media	77,067	134,291	-42.6
Unmeasured	326,000	173,800	87.6
Total	403,067	308,091	30.8
By top brands	**1991**	**1990**	**% chg**
Weight Watchers International	23,528	21,509	9.4
Ore-Ida vegetables	16,522	22,170	-25.5
Heinz condiments	14,815	23,678	-37.4
Reward dog food	5,600	227	NA

SALES & EARNINGS ($ in millions)

Worldwide	1992	1991	% chg
Sales	6,582	6,647	-1.0
Earnings	638	568	12.4
U.S.	**1992**	**1991**	**% chg**
Sales	3,848	3,863	-0.4
Operating income	696	542	28.8

CORPORATE PROFILE

Price elasticity in the recessionary market has prompted H.J. Heinz Co. to continue to downplay the role traditional media advertising plays in its marketing

Top 25 spot radio advertisers

Rank	Advertiser	Spot radio spending 1991	1990	% chg
1	Philip Morris Cos.	$33.5	$29.2	14.7
2	General Motors Corp.	22.3	20.4	9.2
3	Southland Corp.	21.6	20.3	6.4
4	Anheuser-Busch Cos.	19.2	21.0	-8.3
5	PepsiCo	15.2	16.4	-7.5
6	News Corp.	13.3	14.3	-7.2
7	Delta Air Lines	12.9	11.1	16.3
8	American Stores Co.	12.7	9.6	32.8
9	Sears, Roebuck & Co.	11.8	−20.1	-41.2
10	American Express Co.	10.9	7.7	41.6
11	Kmart Corp.	10.7	5.3	101.7
12	Chrysler Corp.	10.1	15.8	-35.9
13	GTE Corp.	10.1	4.8	110.1
14	Pacific Telesis Group	9.9	8.2	20.9
15	Chevron Corp.	9.1	7.5	21.2
16	Volkswagenwerk AG	9.0	5.0	79.0
17	BellSouth Corp.	8.8	8.7	1.2
18	Texaco Inc.	8.7	10.2	-14.8
19	Honda Motor Co.	8.5	7.0	22.1
20	Grand Metropolitan	8.2	8.7	-5.5
21	AMR Corp.	8.0	4.3	84.2
22	Giant Eagle	7.8	7.1	10.1
23	Ciba-Geigy	7.7	6.3	23.8
24	Bell Atlantic Corp.	7.4	7.0	5.8
25	Coca-Cola Co.	7.4	8.5	-13.6

Notes: Dollars are in millions. **Source:** LNA/Arbitron. See Page 72 for methodology.

efforts.

When the company reported earlier this year that it would move the bulk of its advertising funds into trade and consumer promotions for fiscal 1993, begun April 30, it marked the third straight year of declining media spending.

Heinz in fiscal 1992 pumped up its worldwide marketing expenditures by 15.3% to $403 million, funneling virtually all the new money and a sizable portion of the media budget into trade and consumer promotion. Heinz came off with stronger than expected sales volume as a result, the company said.

Heinz, like other food companies, has suffered from price-conscious consumers trading down during the recession. Its volume in fiscal 1992, however, remained unchanged from the prior year as sales decreased 1%—even that may be a victory in today's market.

U.S. media spending has declined the past three years at Heinz. In calendar 1991, it fell to $77 million, down 42.5% from $134.2 million in 1990, which was down 10.1% from the year before.

The company says Heinz ketchup was one of the main beneficiaries of the beefed up promotional spending. Shipments of the brand rose 6% by June 1992, spurred in part by national and regional tie-in programs with two popular food products, General Mills' Gorton's fish sticks and Sara Lee Corp.'s Bryan's hot dogs. Heinz ketchup commands 52% of the $446.5 million market, according to Nielsen Marketing Research.

Heinz supported ketchup with $9.4 million in media during calendar 1991, down 35%, according to LNA/Arbitron Multi-Media Service.

The company says that in addition to ketchup, volume gains came from StarKist tuna, private-label soup and Weight Watchers brand specialty foods. Volume declines came from dog foods, 9-Lives cat food, Ore-Ida frozen potatoes, Weight Watchers brand products and frozen meals.

Heinz's HomeStyle gravy grew 12.3% in sales to take 53% of the $118 million market, according to Information Resources Inc. The line was backed with $3.6 million in ad support. HomeStyle faces new competition this year from Campbell Soup Co.'s Pepperidge Farm unit's new line of 98% fat-free gravies.

Volume increased more than 10% for Heinz USA's private-label soup business giving it a 5% share of market—the result of new distribution and trading down by consumers. The Ore-Ida brand maintains a 48% share of the retail frozen potato category; according to LNA, it got about $16 million in media, down 25.5%.

The Weight Watchers brand of frozen entrees brought out three new lines—Ultimate 200 entrees containing 200 calories or less; Stir-Fry; and Smart Ones, entrees with 1 gram of fat or less and aimed at men.

Weight Watchers had a 7.5% share of the frozen prepared dinners and entrees market for the year ended April 18, 1992, according to Nielsen. It repositioned and renamed its frozen breakfast items as Weight Watchers Breakfast on the Go. All items can be hand-held.

Weight Watchers tried to move beyond "healthy" as a tag for its frozen desserts because of its overuse via a new ad theme: "Total indulgence, zero guilt."

Weight Watchers International, backed with more than $23 million in media spending in 1991, remains the gold standard in weight-loss programs.

Attendance in the North American company-owned operations was up 10% during the first quarter of 1992. Because of the recession and other factors, sales at commercial weight-loss systems fell 12% in 1990 and grew only about 3% in 1991 to $2.06 billion, according to Marketdata Enterprises, a market research company.

StarKist Seafood Co. introduced in July 1992 Charlie's Lunch Kit, the first portable tuna meal, aimed at boosting lunchtime consumption of tuna, particularly among working women.

Reward superpremium canned dog food achieved a 22% share of the total canned dog food segment for a No. 2 ranking in its first year of national distribution, the company said. Reward was introduced in 1991 following 2½ years in test market. 9-Lives canned cat food achieved a 25% share in early 1992, up from 15% in summer 1991. Heinz, which backed its pet food lines with about $9 million in media support, ranks fourth in the $4.7 billion pet foods market with an 11.25% share, according to Nielsen.

HEADQUARTERS

H.J. Heinz Co./600 Grant Street/Pittsburgh, Pa. 15230-2857/P.O. Box 57/Pittsburgh, Pa. 15230-0057/Phone: (412) 456-5700.

PERSONNEL, BRANDS, AGENCIES

Heinz USA: 1062 Progress/Pittsburgh, Pa. 15212/P.O. Box 57/Pittsburgh, Pa. 15230/Phone: (412) 237-5757. B. Falck, vp-retail mktg; J. Conner, gm-adv brands; B. Roussey, gm-value added brands; B. Behrman, gm-new brands mktg; B. Fisher, vp-bus devel; M.McCollough, gm-mktg svcs; M. Milrod, mgr, promo-adv svcs, J. Berger, vp-foodservice mktg; H. Lockard, gm-foodservice; P. Jack, grp prod mgr.

Heinz ketchup, Heinz baby food, Heinz pickles, HomeStyle Gravy, Specialty Sauces, Near East rice mixes and China-Bee rice cakes: Leo Burnett USA, Chicago. S. Harrington, acct dir; S. Speling, A. Conkle, acct execs.

Heinz 57 Sauce, Alba: Ketchum Advertising, Pittsburgh. L. Frohm, vp-acct super.

Heinz foodservice prods: The Food Group, Tampa. R. Hager, sr vp; P. Pearlman, vp-creative dir.

ORE-IDA FOODS: 220 W. Parkcenter Blvd./Boise, Idaho 83706/P.O. Box 10/Boise, Idaho 83707/Phone: (208) 383-6100. M. Taylor, vp-mktg; R. Ginkel, prod mgr, Ore-Ida brand; M. Carlson, vp-bus devel; L. Banducci, mgr-pr and communs.

DDB Needham Worldwide, New York. Jeff Saverine, mgmt super; Todd Brenard, acct super.

WEIGHT WATCHERS INTERNATIONAL: Jericho Atrium/500 N. Broadway/Jericho, N.Y. 11753/Phone: (516) 939-0400. R. Adams, vp-mktg/devel; W. Perra, gm-mktg svcs; L. Webb, gm-brand comms.

Earle Palmer Brown Cos., Bethesda, Md. Claire Geier, exec vp-gm.

WEIGHT WATCHERS FOOD CO.: 625 Liberty Ave./Pittsburgh, Pa. 15222/P.O. Box 57/Pittsburgh, Pa. 15230/Phone: (412) 263-6400. P. Olson, gm-mktg strategy devel; J. Abraham, gm-bus devel; L. Webb, gm-brand comms.

Weight Watchers frozen foods, Ultimate 200, Stir-Fry, Smart Ones, Breakfast on the Go: Ally & Gargano, New York. J. Hanzik, sr vp-mgmt dir.

HEINZ PET PRODUCTS CO.: One Riverfront Place/Newport, Ky. 41071/Phone: (606) 655-5700. M. Milone, vp-mktg; B. Mirsky, gm-pet snacks; J. Roxstrom, gm-customer mktg; M. Katz, consumer mktg mgr-canned cat food; D. Rosenthal, consumer mktg mgr-canned dog food; E. Uebele, consumer mktg mgr-pet treats; D. Ollinger, consumer mktg mgr-dry/soft moist; D. Lund, consumer mktg mgr-new pet treats; B. Pruden, customer mktg mgr-canned cat food; S. Dehner, customer mktg mgr-canned dog food; D. Burt, customer mktg mgr-pet treats; J. Johnston, customer mktg mgr-dry/soft moist.

9-Lives, 9-Lives kitten dinners, Crunchy Meals, Tender Meals, 9-Lives Lean Entrees, 9-Lives cat treats, Reward, Skippy, Jerky Treats, Kozy Kitten, Meaty-Bone, Amore: Leo Burnett USA, Chicago. G. Singer, acct dir; S. Matson, acct super; J. Hillman, acct exec; S. Vogel, acct exec; C. Nicklo, acct exec; D. Kamas, asst acct exec.

Media buying and planning: Media That Works, Cincinnati. L. Veil, exec vp-coo; A. Hoffman, acct mgr; B. Rains, acct mgr.

STARKIST SEAFOOD CO.: 180 E. Ocean Blvd./Long Beach, Calif. 90802/Phone: (310) 590-7900. J. Heil, vp-mktg and sales; C. Lischewski, vp-procurement & bus devel; M. Horak, gm-trade mktg; V. Daukas, prod mgr-trade mktg; T. Brancky, mktg mgr-new bus devel; M. Christenson, mktg mgr-trade mktg; B. Worsham, gm-special accts-Canada; D. Gallagher, gm-retail sales; J. Clancy, natl sales mgr; M. Cohen, mktg mgr-light meat retail; E. Melsby, mgr-mktg rsch/pkg info; G. Andrews, asst prod mgr.

StarKist tuna: Leo Burnett USA, Chicago. Sean Harrington, acct dir.

RANK: 65

Helene Curtis Industries

Chicago

Ad spending: **$157.4** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	19,535	23,109	-15.5
Sunday magazine	0	65	NA
Newspaper	0	10	NA
Outdoor	0	310	NA
Network TV	45,154	56,623	-20.3
Spot TV	2,600	1,379	88.5
Syndicated TV	19,691	11,747	67.6
Cable TV networks	4,262	2,408	77.0
Spot radio	59	568	-89.6
Measured media	91,299	96,218	-5.1
Unmeasured	66,100	49,200	34.3
Total	157,399	145,418	8.2
By top brands	**1991**	**1990**	**% chg**
Degree anti-perspirant	23,559	19,903	18.4
Finesse haircare prods	17,030	19,157	-11.1
Salon Selectives shampoo & cond	12,766	14,444	-11.6
Salon Selectives haircare products	10,810	13,368	-19.1

SALES & EARNINGS ($ in millions)

Worldwide	1992	1991	% chg
Sales	1,020	867	17.6
Earnings –	19	7	195.9
U.S.	**1992**	**1991**	**% chg**
Sales	733	640	14.6
Operating profit	57	45	28.4

CORPORATE PROFILE

Helene Curtis Industries' 1992 fiscal sales passed $1 billion worldwide for the first time, spurred by the strong success of its megabrand—Suave.

Domestic sales for the fiscal year ended Feb. 29 increased 14% largely as a result of the Suave brand, which grew 20% in sales.

Earnings rebounded during the year because of lower introductory expenses compared with prior-year levels when Curtis spent an estimated $50 million to back new Degree, the heat-activated antiperspirant/deodorant.

Curtis is the second-leading shampoo marketer, behind Procter & Gamble Co., with a 16.7% share of the $1.12 billion category, according to Towne-Oller & Associates. The company also holds the first three spots in the $498.4 million conditioner segment—Suave at 9.3%, Salon Selectives, 7.5%, and Finesse, 7.2%.

Early this year, Curtis launched Vibrance, a fourth line of haircare products, with a $55 million campaign that included $33 million in promotion.

Suave this month is extending its haircare, hand and body lotion and antiperspirant/deodorant franchise to facial care. The eight-product line includes astringent, cold cream, moisturizer, facial cleansing bar, cleansing cream and foaming facial wash. Like the rest of the Sauve family, the new line is positioned as a value alternative.

Suave was backed with $17.8 million in media, according to LNA/Arbitron Multi-Media Service. It holds a 4% share of the $488.6 million hand-and-body lotion retail market, according to Towne-Oller, while Suave shampoo holds 7.6% of the $1.12 billion shampoo market. Finesse and Salon Selectives claim shares of 4.3% and 3.7% in the category, respectively.

Curtis upped support for Degree by 15.5% to $23.5 million to offset both a slight share decline to 4% and new entries in the $1.4 billion category. According to Nielsen Marketing Research, Curtis holds a combined share of 8.1%, compared with 27.8% for No. 1 P&G's Secret and Sure.

In June, Curtis made an estimated $20 million to $25 million upfront buy on CBS; it may be tied to a cross-media package with The New York Times Co.'s Women's Magazines Division this fall.

Curtis, which builds brands that can be leveraged across international borders, saw non-U.S. sales growing 26% in fiscal 1992.

HEADQUARTERS

Helene Curtis Industries/325 N. Wells St./Chicago, Ill. 60610/Phone: (312) 661-0222.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Richard Frank, vp-mktg; Jon Achenbaum, dir-mktg resources and strategic planning.

Suave: Bayer Bess Vanderwarker, Chicago. Dick Corelitz, exec vp.

Degree, Finesse, Salon Selectives, Vibrance: Saatchi & Saatchi Advertising, New York. Paula Forman, exec vp-exec mgmt dir.

RANK: 32

Hershey Foods Corp.

Hershey, Pa.

Ad spending: **$298.9** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	6,011	8,417	-28.6
Sunday magazine	124	487	-74.5
Newspaper	0	368	NA
Outdoor	7	14	-53.8
Network TV	28,300	52,220	-45.8
Spot TV	13,411	18,822	-28.7
Syndicated TV	16,840	14,458	16.5
Cable TV networks	3,436	3,696	-7.0
Network radio	4,135	8,858	-53.3
Spot radio	1,691	1,367	23.7
Measured media	73,956	108,708	-32.0
Unmeasured	224,900	193,300	16.3
Total	298,856	302,008	-1.0
By top brands	**1991**	**1990**	**% chg**
Hershey candies	21,950	39,124	-43.9
Reese's candy	13,014	9,666	34.6
Hershey's chocolate syrup	7,588	4,945	53.5
Peter Paul	5,529	10,516	-47.4

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	2,899	2,716	6.8
Earnings	220	216	1.7
U.S.	**1991**	**1990**	**% chg**
Sales	2,566	2,509	2.3
Income from cont. op.	382	344	10.8

CORPORATE PROFILE

After a difficult 1991, Hershey Foods Corp.'s key business—confectionery products—are on an upswing in 1992.

Sales volumes for Hershey Foods brands this year are bettering 1991 levels: up 11% for Hershey Chocolate U.S.A. in the second quarter, for example, and up 14% for Hershey Pasta Group.

U.S. confectionery sales for Hershey were $1.7 billion retail, or a 26.6% share of the $6.4 billion market vs. 23.9% for M&M/Mars, in the 12 months ended June 1992, according to Nielsen Marketing Research.

In non-chocolate candies—where M&M/Mars is stronger—Hershey, with an 8.7% share, trailed its rival's 11.7% in the same period, according to ICC/Accutracks.

Hershey expects to maintain its promotion and ad spending in the range of 15% to 17% of sales. The company is spending increasing dollars on promotion at the expense of media.

Hershey's 12% (5¢ a bar) candy bar price hike in early 1991, the first in five years, triggered immediate unit volume drops for Hershey Chocolate U.S.A. in last year's second and third quarters.

But others followed suit, resulting in lackluster growth for U.S. confectionery shipments for the year.

Industrywide shipments of chocolate goods had an unusual year-to-year decline of 3.6% to 2.66 billion pounds, according to the U.S. Department of Commerce.

Total candy shipments were up about 3% in 1991, however.

Candy market conditions set the stage for price rebate promotions, begun early this year by M&M/Mars and quickly matched by Hershey.

Hershey early this year put the powerful Reese's brand name on a new peanut butter product, which held a 1.9% share for the year ended May 23, according to Nielsen.

The marketer added fat-free, 100-calorie versions of its Hershey's chocolate bar flavor puddings under the Hershey's Free name, and launched Hershey's Reduced Calorie and Fat candy bar this month (150 calores and 9 grams of fat) to match M&M/Mars' Milky Way II, a 25%-reduced-calorie candy bar (190 calories and 8 grams of fat).

Last year Hershey added Amazin' Fruit gummy bears, made with real fruit juices, and is evaluating the performance of the new Reese's peanut butter and caramel cup.

Combined sales for Hershey Pasta Group's eight regional brands have surged in 1992's first half—up 14% in the second quarter alone. Leading brands Ronzoni and San Giorgio outpaced category sales growth of 2.2% for dry macaroni and 1.6% for spaghetti.

Ronzoni macaroni sales surged 17.6% to a 10.2% share in the year ended March 14 as it expanded into New England, and San Giorgio sales climbed 9.5% for a 7.3% share. San Giorgio spaghetti sales rose 5.9% to a 6.6% share, and Ronzoni sales climbed 3.6% to a 6.2% share.

HEADQUARTERS

Hershey Foods Corp./100 Crystal A Drive/P.O. Box 810/Hershey, Pa. 17033-0810/Phone: (717) 534-6799.

PERSONNEL, BRANDS, AGENCIES

HERSHEY CHOCOLATE U.S.A.: 14 E. Chocolate Ave./Hershey, Pa. 17033/Phone: (717) 534-4200. Jay F. Carr, vp-mktg; Anthony J. Pingitore, gm-special mkts; Michael H. Holmes, gm-grocery.

Amazin' Fruit, Cadbury prods, Hershey's toppings, Hershey's chocolate-flavor syrup, Hershey's chocolate milk mix, Kit Kat bar, Holp's mentholated cough drops, Luden's throat drops, Mr. Goodbar, Reese's peanut butter, Reese's Pieces, Skor toffee bar, Whatchamacallit bar, Y&S candies, York peppermint patties, Symphony candy bars: DDB Needham Worldwide, New York. Peter Tate, exec vp.

Bar None, Big Block bars, seasonal shapes, 5th Avenue Bar, Giant Kiss, Golden Almond Bar, Golden Almond Solitaires, Hershey's Kisses, Hershey's Kisses with almonds, Hershey's milk chocolate bar, Hershey's milk chocolate bar with almonds, Krackel bar, Hershey's baking chocolate, Hershey's chocolate chips, Hershey's cocoa, Hershey's Miniatures, Almond Joy, Mounds, Reese's peanut butter cups, Reese's crunchy peanut butter cups, Reese's peanut butter chips, Reese's miniatures, Rolo: Ogilvy & Mather, New York. Michael Vaughn, sr vp-exec grp dir.

HERSHEY PASTA GROUP: 100 Crystal A Drive/Hershey, Pa. 17033-0810/Phone: (717) 534-7100. Clifford K. Larsen, vp-mktg; Gary Lauerman, dir-mktg svcs.

American Beauty, Delmonico, Light 'N Fluffy, Perfection, P&R, San Giorgio, Skinner: Sauter & Hirsh, New York. Gus Sauter, pres; Jeffrey Hirsh, exec vp.

Ronzoni: Pedone & Partners, New York. Jim Coakley, acct super.

HERSHEY REFRIGERATED PRODS: 100 Crystal A Drive/Hershey, Pa. 17033-0810/Phone: (717) 534-6799. Grace Thomas, dir-mktg.; David Menicheschi, gm.

Hershey's and Hershey's Free chocolate bar flavor puddings: DDB Needham Worldwide, New York. Peter Tate, exec vp.

RANK: 31

Honda Motor Co.

Tokyo

Ad spending: **$333.1** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	58,113	61,291	-5.2
Sunday magazine	1,971	846	132.9
Newspaper	10,628	10,563	0.6
Outdoor	1,251	813	54.0
Network TV	116,974	118,989	-1.7
Spot TV	35,170	22,256	58.0
Syndicated TV	5,104	4,051	26.0
Cable TV networks	4,751	5,785	-17.9
Spot radio	8,500	6,959	22.1
Measured media	242,463	231,553	4.7
Unmeasured	90,600	86,500	4.7
Total	333,063	318,053	4.7
By top brands	**1991**	**1990**	**% chg**
Honda cars	127,601	115,392	10.6
Acura cars	99,955	100,684	-0.7
Honda lawn equipment	9,808	4,892	100.5

SALES & EARNINGS ($ in millions)

Worldwide	1992	1991	% chg
Sales	33,059	30,507	8.4
Earnings	488	541	-9.7
U.S.	**1992**	**1991**	**% chg**
Sales	15,144	13,964	8.4
Division sales	**1992**	**1991**	**% chg**
Automotive	26,776	24,650	8.6
Motorcycles	3,849	3,756	2.5
Other businesses	1,954	2,102	-7.0

CORPORATE PROFILE

Honda Motor Co., faced with slumping worldwide auto sales, upheavals in top management and a 14.6% drop in net income, found a brief bright spot in its U.S. sales arm in 1991.

U.S. subsidiary American Honda Motor Co. posted record 1991 revenues despite a 6% decline in unit sales for the year, although in first quarter 1992, ended in June, unit sales plunged 20% from a year earlier in North America, Honda's biggest auto market. Worldwide, unit sales fell 5.3%.

Top 25 network radio advertisers

Rank	Advertiser	Network radio spending 1991	1990	% chg
1	**Sears, Roebuck & Co.**	$66.5	$71.3	-6.7
2	**Gateway Educational Products**	41.7	19.0	119.6
3	**AT&T Co.**	30.1	31.2	-3.5
4	**Volkswagenwerk AG**	22.0	31.5	-30.1
5	**General Motors Corp.**	17.2	25.2	-31.9
6	**Accor SA** (Motel 6, Sofitel)	15.7	19.5	-19.6
7	**Goodyear Tire & Rubber Co.**	15.4	14.2	8.5
8	**Chrysler Corp.**	14.6	10.0	46.5
9	**Warner-Lambert Co.**	14.6	11.6	25.7
10	**U.S. Government**	13.9	15.3	-9.3
11	**Bayer AG**	11.7	14.8	-20.4
12	**Campbell Soup Co.**	11.3	12.5	-9.9
13	**Kmart Corp.**	11.0	11.0	0.4
14	**Dow Jones & Co.**	10.9	8.7	24.7
15	**Procter & Gamble Co.**	10.8	17.6	-38.6
16	**Carlson Cos.**	9.8	6.4	53.5
17	**Martin Himmel Inc.**	9.1	5.0	80.4
18	**Xerox Corp.**	7.2	7.2	0.5
19	**J.C. Penney Co.**	7.1	6.7	5.7
20	**Loews Corp.**	6.8	10.6	-36.0
21	**Philip Morris Cos.**	6.6	14.5	-54.6
22	**General Electric Co.**	6.4	5.8	11.3
23	**Sara Lee Corp.**	6.4	2.1	211.4
24	**American Home Products Corp.**	6.2	1.3	362.2
25	**Ford Motor Co.**	6.0	14.9	-59.5

Notes: Dollars are in millions. **Source:** LNA/Arbitron. See Page 72 for methodology.

Honda had unit sales in 1991 of 803,367 cars—including 143,708 of the luxury Acura models, up 3.8%, and 659,659 Accord, Civic and Prelude cars, down 7.9%.

Of the latter two makes, 482,097 were U.S.-built, a figure up 3.8%—a major reason for the revenue growth in the U.S.

Honda finished the year with a 6.5% share of the U.S. car and light-truck market, up from 6.2%. (Shares include Acura shares of 1.2% and 1% in 1991 and 1990, respectively.) Toyota led Japanese marketers at 8.2% (including Lexus), according to *Automotive News*.

For the third straight year, Honda's Accord was the best-selling car in the U.S. with sales of 399,297, down 2.7%. But there are signs the Accord's lead may be withering. Despite heavy discounts, for the first half of 1992, Accord sales were off 10.4%.

The 1993 model year began in August with the introduction of the Civic del Sol open-air coupe featuring a removable hardtop that fits into the trunk. The car replaces the CRX model, and carries a base price of $13,200. Civic sales declined 13.2% overall in 1991.

In media spending, the Honda Accord got $46.4 million, up 13.1%. Civic models claimed an estimated $39.8 million, up 20.6%, and the imported Civic CRX, $5.1 million, down 49%, according to LNA/Arbitron Multi-Media Service.

The Acura line of luxury autos accounted for total media expenditures of $100 million in 1991, about the same level as a year earlier. The top-of-the-line Legend, with unit sales of 65,689, up 22.4%, claimed about $56 million in media, up 19.1%. The success of Toyota's Lexus SC400 against the Legend Coupe is a matter of concern.

At midyear 1992, sales of 64,293 Acuras, down 10.2%, gave the division a 1% share of the total U.S. car/light-truck market, down from 1.1%. But Toyota's Lexus sales took off, up 54.7%, and Nissan's Infiniti sales jumped 29.1% for the period. Sales of Honda cars also lagged at the halfway point, dropping to 312,797, down 4.5%.

Honda continued to maintain a small lead in the shrinking motorcycle market, finishing 1991 with a 28.7% share, down from 29.4%. Harley-Davidson ranks No. 2 at 20.2%.

HEADQUARTERS

American Honda Motor Co./1919 Torrance Blvd./Torrance, Calif. 90501-2746/Phone: (310) 783-2000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Honda autos: T. Okusa, Thomas Elliott, exec vps. Acura: Edward R. Taylor, vp-sales; Eric Conn, sr auto adv mgr. Honda Motorcycle div: John Petas, sr vp; Ray Blank, asst vp-mktg; Wayne Toyota, natl adv mgr. Honda Power Equipment div: Shoichi Tanaka, sr vp; Wade Terry, vp; John Lally, adv mgr.

Honda power equipment brands: Fahlgren Martin, Atlanta, Rick Hauser, acct super.

Honda autos: Rubin Postaer & Associates, Los Angeles. Chuck Valentine, sr vp-grp acct dir. Hispanic mktg: La Agencia de Orci, Los Angeles. Roberto Orci, sr vp.

Acura autos: Ketchum Advertising, Los Angeles. Craig Mathiesen, pres.

Honda motorcycles, scooters, ATVs: Dailey & Associates, Los Angeles. Dean Thompson, vp-mgmt super.

RANK: 91

Hyundai Group

Seoul, S. Korea

Ad spending: **$119.5** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	21,179	17,765	19.2
Sunday magazine	0	37	NA
Newspaper	1,973	1,373	43.7
Outdoor	544	511	6.3
Network TV	28,219	31,169	-9.5
Spot TV	16,238	32.530	-50.1
Syndicated TV	12,765	8,346	52.9
Cable TV networks	3,676	1,068	244.1
Spot radio	742	3,776	-80.4
Measured media	85,335	96,575	-11.6
Unmeasured	34,200	38,700	-11.6
Total	119,535	135,275	-11.6

SALES & EARNINGS ($ in millions)

Worldwide	1992	1991	% chg
Sales	NA	40,250	NA
Earnings	NA	93	NA

CORPORATE PROFILE

The impact of the Value Care program, introduced in 1991 and offering two years of free maintenance on Hyundai cars, is said to have improved the South Korean car marketer's image, although not its sales.

Car sales from Hyundai Motor America last year fell 14.4% to 117,630 in the U.S., giving Hyundai a 1% share of the U.S. car and light-truck market, same as in 1990, according to *Automotive News*. Further erosion had set in by midyear 1992 as sales slipped to 55,062 units, off 3.6% from the prior-year period.

Unit sales are far removed from the 264,282 sold in the peak year of 1988, only two years after Hyundai hit the U.S. market.

Hyundai Motor America is the U.S. sales arm and largest subsidiary of South Korea's Hyundai Group.

In the U.S. last year, sales of the mainstay Excel dropped 34% to 66,376. The upscale Sonata accounted for 20,966, down 29%, with the sporty Scoupe subcompact selling 26,421 in its first full year. Sales of the new Elantra subcompact reached 3,867 units in only three months on the market.

Of the $85.3 million Hyundai spent in media, down 11.6%, the Scoupe drew $20 million; Excel, $10 million, down 66%; and Sonata, $18.1 million, down 41.9%, according to LNA/Arbitron Multi-Media Service.

Advertising continued to position Hyundai as a multiproduct car marketer moving upscale. The Scoupe was the centerpiece of the campaign.

HEADQUARTERS

Hyundai Motor America/10550 Talbert Ave./Fountain Valley, Calif. 92728/Phone: (714) 965-3000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: D.O. Chung, pres-ceo; Rod Hayden, exec vp-coo; Russ Reeder, prod planning dir; Joe Corey, natl adv mgr.

Backer Spielvogel Bates Worldwide, Irvine, Calif. Robert Svete, vp-acct super.

RANK: 68

ITT Corp.

New York

Ad spending: **$141.5** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	5,044	6,760	-25.4
Sunday magazine	271	610	-55.6
Newspaper	9,708	11,319	-14.2
Outdoor	503	860	-41.4
Network TV	11,811	8,917	32.5
Spot TV	8,230	10,256	-19.8
Cable TV networks	1,907	1,942	-1.8
Network radio	0	1,635	NA
Spot radio	0	401	NA
Measured media	37,474	42,699	-12.2
Unmeasured	104,000	118,500	-12.2
Total	141,474	161,199	-12.2
By top brands	**1991**	**1990**	**% chg**
Sheraton hotels	14,258	19,984	-28.7
ITT Corp	12,259	9,986	22.8
ITT Institutes	8,272	6,222	33.0

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	20,421	20,604	-0.9
Earnings	817	958	-14.7
U.S.	**1991**	**1990**	**% chg**
Sales	14,111	14,106	0.0
Income	714	514	38.9
Division sales	**1991**	**1990**	**% chg**
Automotive	2,933	2,916	0.6
Components	1,029	1,110	-7.3
Fluid technology	1,064	1,057	0.7
Defense	1,201	1,612	-25.5
Forest products	995	1,118	-11.0
Insurance	9,242	8,836	4.6
Finance	2,026	1,896	6.9
Communications & info services	1,028	973	5.7
Hotels	717	746	-3.9
Equity in Alcatel NV	208	213	-2.3

CORPORATE PROFILE

ITT Sheraton Corp.'s advertising this year sounds like the hotelier is about to become airborne with its SuperSaver rates, inaugurated this spring in response to similar high-flying tactics from other players in the hotel industry.

Borrowing the language of the skies was both calculated and timely at Sheraton, which accounts for 45% of parent ITT Corp.'s total media expenditures. Its SuperSaver rates were modeled after the airlines' highly publicized rates.

The Sheraton plan consisted of three tiers—the business traveler, 14-day advance bookings and weekend stays.

"What airlines are doing for travelers up there, we're doing for travelers down here," ads proclaimed.

The hotel industry's average occupancy rate last year was 60.8%, the lowest in 20 years. Low prices offered by such programs, however, offer a double-edged sword. They stimulate traffic but at a cost. Not all in the industry were willing to join the gambit. A few months after SuperSaver was announced, Hilton Hotels Corp. countered with ads stressing service and other amenities over low prices.

ITT Corp. Chairman-CEO Rand V. Araskog early this year said he expected Sheraton to show a profit by yearend. For the first half of 1992, however, Sheraton reported a $30 million operating loss, compared to a $12 million gain for the like period in 1991. Sheraton's sales for the half were $365 million, up 9%.

ITT increased its network TV investment for general promotion in 1991, spending $11.2 million, up 57.7%, according to LNA/Arbitron Multi-Media Service.

Among ITT's nine major divisions, the only significant media ad spenders besides Sheraton are ITT Educational Services & Technical Institutes ($8.2 million in 1991) and ITT Hartford Insurance Group ($1.2 million), LNA noted.

Because many of its units supply other businesses, an estimated 75% of ITT's total ad budget is in unmeasured media, including direct mail and business-to-business advertising.

HEADQUARTERS

ITT Corp./1330 Avenue of the Americas/New York, N.Y. 10019/Phone: (212) 258-1000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Juan C. Cappello, sr vp-government/corp relations & adv; Steven A. Erenburg, dir-corp comms.

Corporate adv: Wells Rich Greene BDDP, New York; Frank Sampogna, exec vp-acct grp head.

ITT HARTFORD INSURANCE GROUP: Hartford Plaza/Hartford, Conn. 06115/Phone: (203) 547-5000. John J. Dayl Jr., asst vp-creative comms.

Hartford Insurance: McCaffrey & McCall, New York; Michael Sugzda, acct super.

ITT SHERATON CORP: 60 State St./Boston, Mass. 02109/Phone: (617) 367-3600. Robert F. Cotter, sr vp-mktg.

Sheraton hotels: Wells Rich Greene BDDP, New York. Frank Sampogna, exec vp-acct grp head.

RANK: 7

Johnson & Johnson

New Brunswick, N.J.

Ad spending: **$733.0** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	56,331	28,899	94.9
Sunday magazine	2,663	880	202.5
Newspaper	369	494	-25.4
Outdoor	0	186	NA
Network TV	239,823	211,441	13.4
Spot TV	23,691	17,673	34.0
Syndicated TV	38,273	33,395	14.6
Cable TV networks	9,521	8,325	14.4
Network radio	0	3,220	NA
Spot radio	409	919	-55.5
Measured media	371,079	305,431	21.5
Unmeasured	361,900	297,900	21.5
Total	732,979	603,331	21.5
By top brands	**1991**	**1990**	**% chg**
Tylenol pain reliever	93,421	91,745	1.8
Tylenol sinus capsules	54,748	42,544	28.7
Monistat 7 vaginal yeast cream	42,308	0	NA
Imodium A D	16,256	17,276	-5.9
Reach toothbrushes	15,496	16,035	-3.4
J&J baby creams & lotions	14,033	7,944	76.6
Acuvue disposable lenses	13,173	11,715	12.5
Johnson & Johnson powders	12,096	9,756	24.0
Stayfree feminine protection	11,478	17,039	-32.6
Band-Aid bandages	10,089	8,063	25.1

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	12,447	11,232	10.8
Earnings	1,461	1,143	27.8
U.S.	**1991**	**1990**	**% chg**
Sales	6,248	5,427	15.1
Operating profit	1,022	904	13.1
Division sales	**1991**	**1990**	**% chg**
Consumer	4,584	4,212	8.8
Pharmaceutical	3,795	3,303	14.9
Professional	4,068	3,717	9.4

CORPORATE PROFILE

Johnson & Johnson's consumer segment, which recorded a dramatic 17.8% jump in domestic sales in 1991, got its boost from Monistat 7, recently converting to over-the-counter, and segment mainstay Tylenol.

Monistat 7 vaginal yeast cream, which went OTC in March 1991, quickly rose to the top of its market, valued at $286.1 million retail. At midyear 1992, the antifungal product claimed a 57.1% share, well ahead of Schering-Plough Corp.'s Gyne-Lotrimin at 31.5%.

Monistat 7 and Gyne-Lotrimin, also a former prescription drug, dominate media spending in the category with 1991 outlays of $42.3 million and $32.9 million, respectively, according to LNA/Arbitron Multi-Media Service.

Tylenol, from McNeil Consumer Products, has built a marketing hegemony in the $2.3 billion analgesics category with a 33.6% share, including Extra Strength Tylenol, 20.8%; Tylenol Children, 7%; Tylenol PM and Regular Strength, both at 2.8%; and Mediprin, 0.2%, according to Towne-Oller & Associates.

Ad spending for all Tylenol brand products reached $148.3 million in 1991, up 10.4% from 1990, according to LNA, and accounted for 60% of all Johnson & Johnson media spending.

Johnson & Johnson Consumer Products rolled out a Winnie-the-Pooh line in the $300 million children's shampoo segment. The line includes Pooh's shampoo, Eeyore's conditioning detangler, Pooh's conditioning shampoo, Tigger's bath bubbles and Piglet's liquid bath.

Johnson & Johnson consolidated its estimated $20 million oral-care account in April, including Reach toothbrushes, Act fluoride rinse and Johnson & Johnson dental floss, at McCann-Erickson Worldwide, New York. Cadwell Davis Partners handled Act and Reach.

The Mylanta line, supported with $25.8 million in media, same as in 1990, retained the top share (20.6%) of the $762.7 million antacid market, according to Towne-Oller. Second to Mylanta, which

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Top 25 network TV advertisers

		Network tv spending		
Rank	Advertiser	1991	1990	% chg
1	General Motors Corp.	$527.8	$598.4	-11.8
2	Procter & Gamble Co.	515.7	559.9	-7.9
3	Philip Morris Cos.	389.5	402.2	-3.2
4	Johnson & Johnson	239.8	211.4	13.4
5	Kellogg Co.	236.6	301.3	-21.5
6	Ford Motor Co.	217.5	196.9	10.4
7	PepsiCo	204.6	193.4	5.8
8	Sears, Roebuck & Co.	187.9	253.8	-26.0
9	Chrysler Corp.	176.2	190.0	-7.3
10	Toyota Motor Corp.	173.7	170.9	1.6
11	American Home Products Corp.	173.3	150.5	15.1
12	AT&T Co.	172.0	244.9	-29.8
13	McDonald's Corp.	171.8	231.0	-25.6
14	Unilever NV	154.6	162.9	-5.1
15	General Mills	151.4	142.9	6.0
16	Anheuser-Busch Cos.	122.9	129.0	-4.7
17	Honda Motor Co.	117.0	119.0	-1.7
18	RJR Nabisco	112.7	133.6	-15.6
19	Nestle SA	109.0	146.0	-25.3
20	Eastman Kodak Co.	105.6	116.5	-9.4
21	Grand Metropolitan	103.3	183.1	-43.6
22	Bristol-Myers Squibb Co.	95.4	124.4	-23.3
23	Coca-Cola Co.	95.2	88.9	7.1
24	Walt Disney Co.	93.8	62.9	49.1
25	Warner-Lambert Co.	84.1	91.1	-7.7

Notes: Dollars are in millions. **Source:** LNA/Arbitron. See Page 72 for methodology.

is marketed by the Johnson & Johnson-Merck Consumer Pharmaceuticals Co. venture, was SmithKline Beecham's Tums at 15.1%.

Johnson spent $4.5 million in media for o.b. tampons, up 135.4%. The product held a 10.2% share of the $529.3 million tampon market, far from leader Tambrands (53.8% share). Johnson & Johnson's Carefree, Stayfree and Sure & Natural brands are third in the $761.3 million feminine napkin market with a 25% share. Kimberly-Clark Corp. leads at 32.8%, according to Towne-Oller. Media spending for Stayfree, the No. 3 brand at 14.5%, fell 32.6% to $11.5 million, but for Sure & Natural Maxishields jumped 420.2% to $7.1 million, with the addition of spending for Sure & Natural Ultra Thin Maxi, according to LNA.

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HEADQUARTERS

Johnson & Johnson/One Johnson & Johnson Plaza/New Brunswick, N.J. 08933/Phone: (908) 524-0400.

PERSONNEL, BRANDS, AGENCIES

JOHNSON & JOHNSON ADVANCED MATERIALS CO.: 317 George St./New Brunswick, N.J. 08903/Phone: (908) 524-1000. R.I. Munoz, exec vp. ST&L Associates, New Brunswick, N.J. Howard Rich, acct exec.

CODMAN & SHURTLEFF: 41 Pacella Park Dr./Randolph, Mass. 02368/Phone: (617) 961-2300. A.D. Stewart, vp-mktg; D.G. Williams, mgr-mktg comms. **Surgical equipment & supplies:** Chalfin, Kostopulos & Gilmore, Boston. Barry Chalfin, acct exec.

ETHICON INC.: U.S. Route 22/P.O. Box 151/Somerville, N.J. 08876/Phone: (908) 218-0707. R.P. Hickey, vp-mktg, suture/pharmacology prods; D.M. Clapper, vp-mktg, endoscopic/mechanical prods.

Suture, stapling and endoscopy products, adhesion prevention products: Kallir, Philips, Ross, New York. Gabor Osvath, sr vp, mgmt super for suture prods; Laura McElroy, vp-acct grp super, endo/mech prods; Simms & McIvor, Somerville, N.J. Gene Hollen, exec vp-acct svcs, adhesion prevention barrier prods.

JOHNSON & JOHNSON CONSUMER PRODS: Grandview Road/Skillman, N.J. 08558/Phone: (908) 874-1000. C.D. Simonds, company grp chmn-pres; P.S. Michaels, vp-mktg; J.J. Gallagher, vp-sales.

Johnson's Baby Lotion, Johnson's Baby Powder, Johnson's Baby Oil, Johnson's Baby Shampoo, Johnson's No More Tangles, Johnson's Baby Sunblock, Johnson's Baby Washcloths, Johnson's Diaper Rash Relief, Johnson's Bathtime Buddies featuring Pooh & Pals, Johnson's Clean & Clear, Shower to Shower, Band-Aid Brand Bandages, Purpose, Act Fluoride Rinse, Johnson & Johnson Dental Floss, Reach, K-Y Jelly. Lintas:New York, New York. Ned Russell, mgmt super; Eden Compton, acct super. Young & Rubicam, New York. Sean Healy, mgmt super; Steve Rosen, acct super. Earle Palmer Brown/Bergelt Litchfield, New York. Laurie Pastore, mgmt super; Andrew Pratt, acct exec. McCann-Erickson, New York. Mike Nelson, mgmt super; Bob Patton, acct super. FCB/Leber Katz Partners, New York. Colleen Gowl, grp mgmt dir; Dorian Roger, acct dir.

JOHNSON & JOHNSON MEDICAL: One Johnson & Johnson Plaza/New Brunswick, N.J. 08933/Phone: (908) 524-3000. W.A. Clarke, pres; J.R. Maly, sr vp, mktg-sales; H.A. McLeod, vp-sales; R.D. Belin, vp-mktg.

Surgical packs and gowns, custom trays, wound care prods, medical and surgical gloves, wearing apparel, disinfecting and sterilization prods, hemostasis prods: Pierce-David & Associates, Bill Pierce, pres.

MCNEIL CONSUMER PRODUCTS CO.: 7050 Camp Hill Road/Fort Washington, Pa. 19034/Phone: (215) 233-7000. J.T. Lenehan, pres.; B.D. Perkins, vp-mktg; S.J. Fanning, vp-sales; G.A. Clements, vp-prof sales-mktg; E.C. Watson, dir-pr; G.E. Griffiths, dir-sales promo/comms.

Adult Tylenol, Children's Tylenol, Tylenol PM, Tylenol Headache Plus, Tylenol Cough/Cold/Flu, Tylenol Sinus/Allergy Sinus, Children's Tylenol Cold. Saatchi & Saatchi Advertising, New York. R. Pounder, exec vp, mg dir.

Imodium AD, Lactaid: Lintas:New York, New York. Stone Roberts, coo.

PediaCare: Cadwell Davis Partners, New York. F. Cadwell, pres.

Sesame Street Vitamins: Susan Spindler Advertising, Weston, Conn. S. Spindler, pres.

Sine-Aid: Barrie Curtis Spies Creative Services, New York. B. Spies, pres.

Professional adv: Adult Tylenol, Children's Tylenol, Imodium A-D, PediaCare, PediaProfen, Tylenol Sinus: Kallir, Philips, Ross, New York. Karri Hale, sr vp-mgmt super.

Imodium AD, Lactaid: RWR Non-Prescription Advertising, New York. LeeAnne Pilson, sr vp, dir-client svcs.

Chemet: Klemtner Advertising, New York. Michael Trepiccho, exec vp-dir, client svcs.

Hispanic adv: Mendoza, Dillon & Asociados, Newport Beach, Calif. R. Howells, pres.

MCNEIL PHARMACEUTICAL: Welsh & McKean Road/Spring House, Pa. 19477/Phone: (215) 628-5000. M.D. Casey, pres.; T.L. Feldman, natl sales mgr; D. Massand, dir, hospital sales; T.L. Bishop, exec dir, prod mgmt; D.A. Wissner, exec dir-mktg svcs.

Tylenol acetaminophen with codeine, Tylox oxycodone HCl and acetaminophen, Pancrease pancrelipase, Aceon perindopril, Vascor bepridil hydrochloride: Botto, Roessner, Horne & Messinger, New York. R.J. Botto, pres.

Haldol haloperidol decanoate, Parafon Forte DSC chlorzoxazone, [illegible]: Kallir, Philips, Ross, New York. Norman Cooper, pres.

Tolectin tolmetin sodium: Thomas G. Ferguson Associates, Parsippany, N.J. John F. Zweig, pres, coo.

ORTHO PHARMACEUTICAL CORP.: U.S. Route 202 South/P.O. Box 300/Raritan, N.J. 08869/Phone: (908) 218-6000. R.P. O'Neil, vp. Kallir, Philips, Ross, New York. Jim Linzer, vp-acct super.

ADVANCED CARE PRODS DIV: U.S. Route 202 South/P.O. Box 300/Raritan, N.J. 08869/Phone: (908) 524-0400. Peter Gonze, vp-prod mgmt, nonprescription pharmaceuticals; Jill Lesko, business unit dir, consumer diagnostics.

Monistat 7 vaginal antifungal products, Fact Plus and Advance home pregnancy test, Micatin antifungal products, Conceptrol contraceptives: McCann-Erickson Worldwide, New York. Jeanne Courtney, acct exec.

DERMATOLOGICAL DIV.: U.S. Rte. 202 South/P.O. Box 300/Raritan, N.J. 08869/Phone: (908) 218-6511. L.W. Riley, pres.

Professional dermatological products: Kallir, Philips, Ross, New York. Rod Mehling, exec vp-mg dir, informedia, media mktg.

ORTHO BIOTECH INC.: 700 U.S. Route 202 South/P.O. Box 300/Raritan, N.J. 08869/Phone: (908) 704-5000. Rich Zahn, vp-sales & mktg. **Orthoclone OKT-3:** Kallir, Philips, Ross, New York. Jim Linzer, vp-acct super. **Procrit:** Thomas G. Ferguson Associates, New Jersey. Maria Spellman, vp-acct super.

JOHNSON & JOHNSON ORTHOPAEDICS: 325 Paramount Drive/P.O. Box 350/Raynham, Mass. 02767-0350/Phone: (508) 880-8100. S.J. Czick, vp-sales mktg.

Surgical and non-surgical orthopaedic products: ARRCO Medical Advertising, Dedham, Mass. Jerry Reicher, acct exec.

PERSONAL PRODUCTS CO.: Van Liew Ave., Milltown, N.J. 08850/Phone: (908) 524-0500. P.N. Larson, chmn; G.M. Ostrov, pres; J. Rock, vp-mktg.

Stayfree: Saatchi & Saatchi Advertising, New York. Paula Forman, exec vp-exec mgmt dir.

o.b. Cadwell Davis Partners, New York. Eliot Glazer, coo.

Carefree, Sure & Natural: Young & Rubicam, New York. Dani Khoarovani, sr vp-mgmt super.

Serenity: Lintas:New York, New York. Ray Hilton, vp-acct super.

RANK: 61

S.C. Johnson & Son

Racine, Wis.

Ad spending: **$174.0 million**

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	12,946	10,517	23.1
Sunday magazine	338	58	487.0
Newspaper	521	1,336	-61.0
Outdoor	375	670	-44.0
Network TV	51,553	54,165	-4.8
Spot TV	12,438	14,279	-12.9
Syndicated TV	7,997	6,558	21.9
Cable TV networks	2,752	2,705	1.7
Network radio	2,060	6	NA
Spot radio	2,111	2,435	-13.3
Measured media	93,090	92,728	0.4
Unmeasured	80,900	76,600	5.6
Total	173,990	169,328	2.8
By top brands	**1991**	**1990**	**% chg**
Glade air fresheners	31,266	19,688	58.8
Raid insecticides	15,979	14,902	7.2
Johnson's polishes & waxes	11,268	19,066	-40.9
Shout laundry prod	6,617	6,936	-4.6
Curel creams & lotions	5,950	1,621	267.0

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	3,300	3,000	10.0
Earnings	NA	NA	NA

CORPORATE PROFILE

S.C. Johnson & Son in 1991 abandoned efforts to divest its Personal Care Products Division and instead concentrated on promotional campaigns among its established household products, insecticide and personal-care lines.

Edge shaving gel remained one of the brighter performers. Backed by more than $5 million in media, market-leader Edge increased sales by 4% as it claimed a 27.5% share of the highly competitive shaving cream market, valued at nearly $175 million retail.

During the same period, Gillette Co.'s Foamy, fourth in the market at 14.3%, dropped 12.2% in sales, according to Nielsen Marketing Research.

Edge's companion version, Soft Sense Shave Gel for Women, posted a 55.5% sales increase in building an 8.2% share, almost all from promotional spending.

Johnson's Curel held on to a 4% share in the $488.6 million hand-and-body lotion market, aided by a quadrupling of its ad budget to $5.9 million; Soft Sense lotion posted a 2.9% share, though it got no measured ad support in 1991. Media spending was tracked by LNA/Arbitron Multi-Media Service.

In spring 1992, Johnson launched nationally Agree+, a shampoo and conditioner in what the company called a "revolutionary" environmentally friendly pouch. All 10 versions of Agree+, the first combination shampoo-and-conditioner extension of the Agree line, are packaged in collapsible plastic Enviro Pouch dispensers.

Johnson hopes its environmental approach will make up for ground lost to Procter & Gamble Co.'s runaway success, Pert Plus. Agree, with about 2% of the $1.1 billion shampoo category, received about $4 million in media, up from $1 million the previous year.

The Fisher-Price children's toiletries line got virtually no ad support. Industry executives say the company is undecided how to answer the competitive onslaught from Johnson & Johnson's introduction of the Winnie-the-Pooh line.

Cold weather, competitive retrenching and a voluntary product recall of all insect repellents containing the ingredient R-11 dampened sales for household insecticides and repellents during much of 1991. According to Kline & Co., the combined categories held steady at about $570 million in sales.

Johnson's Raid, which owns about one-third of household insecticide category, increased ad spending 7.3% in 1991 to $15.9 million, LNA noted. The company used local ad campaigns, like one featuring New York City cockroaches, to promote the line in selected areas.

Johnson backed its Off! Skintastic, a combination moisturizer and repellent, with more than $2.5 million. Along with Ticks Off!, a product marketed primarily in areas with Lyme disease concerns, Johnson commands more than half the $70 million category, followed by Miles' Cutter, with about 30%, according to consultant Julia Hodge of Kline & Co.

Ad spending for Johnson's Glade line of air fresheners jumped 63% to $31.3 million as the company worked to eke out additional market share in the fad-driven $225 million category. Glade's share rose 1 share point to 32%, according to Kidder, Peabody & Co., primarily on the strength of Glade Plug-Ins. Plug-Ins alone received more than $11.4 million in media support.

Johnson backed Pledge with $8.7 million. It modified a comparative ad claim for new Pledge liquid household cleaner that had implied Murphy's oil soap from Murphy-Phoenix Co. left a residue.

Using a spot originally created in Spain, Johnson in mid-1992 introduced Toilet Duck and Bathroom Duck household cleaners to the U.S.

HEADQUARTERS

S.C. Johnson & Son/1525 Howe St./Racine, Wis. 53403/Phone: (414) 631-2000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: JoAnne Brandes, dir-corp comms worldwide; Jane Hutterly, vp-environmental affairs worldwide. Worldwide Consumer Prods: W.D. Perez, exec vp-Consumer Prods, N. Amer.; W.D. George Jr., pres-coo; Dave May, vp-insect control bus; G. Montezemolo, vp-new mkts; L.L. Beebe, vp-sales; C. J. Goldthwaite, vp-personal prods; H. Fisk Johnson, vp-homecare.

Aveeno cleansing bar/bath lotion, Rhuli prods, 9-1-1 first aid line: Grant/Jacoby, Chicago. John Willie, vp-consumer packaged goods.

S.C. Johnson professional prods div: Grant/Jacoby, Chicago. Jim Head, sr exec vp, bus-to-bus grp.

Brite, Curel, Duster Plus, Edge, Favor, Fisher-Price children's toiletries, Future, Glade, Off!, Pledge, Raid, Shout, Soft Sense, Toilet/Bathroom Duck: Foote, Cone & Belding, Chicago. Paul Vernon, sr vp-grp acct dir.

Halsa, Agree: Foote, Cone & Belding, San Francisco. Richard Ward, sr vp-grp mgmt super.

RANK: 17

Kellogg Co.

Battle Creek, Mich.

Ad spending: **$577.7 million**

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	4,951	8,497	-41.7
Sunday magazine	32	343	-90.6
Newspaper	151	233	-35.3
Outdoor	17	26	-35.4
Network TV	236,569	301,296	-21.5
Spot TV	71,440	44,609	60.1
Syndicated TV	58,390	45,354	28.7
Cable TV networks	9,535	3,570	167.1
Spot radio	206	468	-55.9
Measured media	381,291	404,394	-5.7
Unmeasured	196,400	173,300	13.3
Total	577,691	577,694	-0.0
By top brands	**1991**	**1990**	**% chg**
Kellogg cereals	290,729	333,113	-12.7
Kellogg pastries	24,843	28,244	-12.0
Eggo waffles & pancakes	21,007	15,775	33.2
Kellogg waffles	19,601	18,348	6.8
Kellogg snacks	15,938	1,445	NA
Mrs. Smith desserts	7,559	5,864	28.9

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	5,787	5,181	11.7
Earnings	606	503	20.5
U.S.	**1991**	**1990**	**% chg**
Sales	3,411	3,044	12.1
Net earnings	388	325	19.3

CORPORATE PROFILE

Kellogg Co. has marked a series of milestones in the past 12 months—amounting to a new corporate look for the world's largest cereal company.

After watching its U.S. market share decline for three consecutive years, Kellogg stopped the free fall with added marketing spending and a more focused and conservative new-products program.

Its arsenal included heavy promotional tools, especially price-oriented ones like couponing and free standing inserts, which have been a critical part of the market share battle between Kellogg and General Mills.

Media spending in general dropped, although not on core brands. Corn Flakes spending was up 11.5% to $30.8 million, Raisin Bran was up a whopping 57% to $23.8 million and Froot Loops grew 24.6% to $13.7 million. The flip side was cutting spending to the bone for newer or smaller products like Kenmei rice bran, Mueslix and Oatbake.

That tactic seemed to pay off in an apparent slowdown in private-label cereal sales—most of which directly targets Kellogg's core brands. For the first five months of 1992, private-label products claimed an 8.1% pound share of the market, down slightly from last year. Private label's share four years ago was only 4.3%.

Obviously confident it had figured out a way to deal with the private-label threat, Kellogg boosted cereal prices in May by 1% to 5%. Others rapidly followed.

Kellogg reached a 37.4% pound share of the $8 billion ready-to-eat cereal category in 1991—a share maintained through mid-1992, although some weekly sales reports have it approaching the 41.4% high of 1988. Analysts expect the company to gain at least 1 share point when 1992 is done.

Unlike its string of disappointments in 1989 and 1990, Kellogg's recent new-product offerings, though less risky than the cholesterol-fighting Heartwise/Fiberwise, have reaped immediate rewards. The company claimed leadership in the granola cereal segment with Low-Fat Granola and was pleased with initial sales of Frosted Bran. Both rolled out in early 1992. Two 1991 offerings, Double Dip Crunch and Cinnamon Mini Buns, chalked up respectable market shares of 0.7% each.

Kellogg is now poised to refocus on global expansion. Last year, for the first time, Kellogg's overseas sales volume exceeded its U.S. sales volume, 53% to 47%. Kellogg reorganized its management along global lines, breaking out Kellogg North America and Kellogg USA as distinct entities, headed by corporate Exec VP Gary Costley.

HEADQUARTERS

Kellogg Co./One Kellogg Square/P.O. Box 3599/Battle Creek, Mich. 49016/Phone: (616) 961-2000.

PERSONNEL, BRANDS, AGENCIES

KELLOGG USA: One Kellogg Square/Battle Creek, Mich. 49016/Phone: (616) 961-2000. Gary Costley, corp exec vp-pres; C.M. Gutierrez, corp vp/exec vp-sales & mktg; J.R. Aubuchon, exec vp; C.A. Clark, vp/sr vp-nutrition & mktg svcs; S.W. Richards, sr vp-natl sales mgr; A.K. Hughson, vp-mktg; J.D. Wilson, vp-new prods/convenience foods.

All-Bran, Apple Jacks, Apple Raisin Crisp, Assortment Packs, Bran Buds, Cinnamon Mini Buns, Cocoa Krispies, Common Sense Oat Bran, Corn Flakes, Corn Pops, Cracklin' Oat Bran, Crispix, Double Dip Crunch, Fiberwise, Froot Loops, Frosted Flakes, Frosted Krispies, Frosted Mini-Wheats, Fruity Marshmallow Krispies, Just Right, Kenmei Rice Bran, Low-Fat Granola, Nut & Honey Crunch, Nutri-Grain cereal bars, Oatbake, Pop-Tarts, Product 19, Raisin Bran, Rice Krispies, Shredded Wheat Squares, Smacks, Special K: Leo Burnett USA, Chicago. James Jenness, exec vp-acct dir.

Complete Bran Flakes, Frosted Bran, Fruitful Bran, Mueslix, Nutri-Grain cereals: J. Walter Thompson USA, Chicago. George Lange, sr vp.

Black consumer adv: Vince Cullers Advertising, Chicago. Vince Cullers, pres.

MRS. SMITH'S FROZEN FOODS CO.: South & South Charlotte Sts./P.O. Box 298/Pottstown, Pa. 19464/Phone: (215) 326-2600. J.J. Feeney, chmn-ceo; J.S. MacDonald, vp-genl sales mgr; K. Harlan, vp-mktg.

Eggo waffles, Mrs. Smith's frozen pastries: Leo Burnett USA, Chicago. James Jenness, exec vp-acct dir.

RANK: 98

Kimberly-Clark Corp.

Irving, Texas

Ad spending: $107.7 million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	19,634	22,253	-11.8
Sunday magazine	46	0	NA
Newspaper	1,141	809	41.0
Outdoor	101	17	485.5
Network TV	51,152	43,681	17.1
Spot TV	9,865	10,539	-6.4
Syndicated TV	2,928	4,056	-27.8
Cable TV networks	169	183	-8.0
Network radio	160	608	-73.8
Spot radio	230	502	-54.1
Measured media	85,426	82,648	3.4
Unmeasured	22,300	21,500	3.7
Total	107,726	104,148	3.4
By top brands	**1991**	**1990**	**% chg**
Kleenex Huggies diapers	47,300	40,691	16.2
Kotex feminine protection	12,224	12,979	-5.8
Depend bladder-control	10,280	10,044	2.4
Kleenex tissues	6,839	5,710	19.8

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	6,777	6,407	5.8
Earnings	508	432	17.6

CORPORATE PROFILE

Diapers are king and for good reason at Kimberly-Clark Corp., whose overall revenue growth in 1991 largely tracked the sales performance of its dominant product, the Huggies diaper line.

A boost of 5.7% in Huggies worldwide manufacturers' sales of $4.07 billion, however, couldn't improve its share in a U.S. market where the only share growth is in the private-label end. By mid-May 1992, Huggies' U.S. share had dropped to 30.1% from 32.4% a year earlier, according to Nielsen Marketing Research.

The mature U.S. market for diapers and other major Kimberly-Clark product lines like toilet paper, facial tissue and feminine pads is causing the company to look abroad for growth, much like its main competitor, Procter & Gamble Co. About 80% of Kimberly-Clark sales come from North America.

As expected, the company's disposable diapers and briefs for incontinent adults dominated media spending in 1991, claiming 68% of the total with a collective $57.8 million from Huggies baby diapers ($28.1 million), Huggies Pull-Ups training pants ($19.2 million) and Depends briefs for adults ($10.3 million), according to LNA/Arbitron Multi-Media Service.

New-product rollouts affected those expenditures. Huggies Pull-Ups and Kotex ultrathin feminine pads achieved national distribution last year, while Kleenex premium bathroom tissue, Huggies baby wipes and Huggies Baby Steps diapers (a line improvement designed for stages of a baby's development) reached expanded markets.

In 1992, Baby Steps became fully national in the first quarter. In June, Huggies UltraTrim diapers, 50% thinner and offering the absorbency of diapers twice as thick, were moved into the Pacific Northwest.

Regular Huggies diapers ad spending dropped in '91 by about 8% as these distribution changes were under way. Pull-Ups got 88% more media dollars, and Huggies Baby Wipes claimed $2.37 million, up from $743,800.

The Kotex line, including feminine pads and tampons, drew $1.76 billion in manufacturers' sales worldwide, up 3.5%, according to the company. Kotex brand feminine pads got $6.4 million, up 37%, according to LNA/Arbitron Multi-Media Service.

Spending for the new Kleenex premium bathroom tissue rose 54% to $2.8 million. Kleenex Ultra, a lotioned facial tissue that has yet to roll national, received $1.7 million. Kimberly-Clark's bathroom tissue business was particularly troubled by competitive pricing as manufacturers' sales dropped 5.7% to $2.5 billion even though product volume increased 3%.

Kimberly-Clark claims 35% of the U.S. market for feminine pads, 45% of the incontinence care market and 45% of the facial tissue market. Huggies is the No. 1 brand in disposable diapers. Rival P&G holds about a 50% share with its two brands, Pampers and Luvs.

HEADQUARTERS

Kimberly-Clark Corp./World Headquarters/Box 619100/DFW Airport Station/Dallas, Texas 75261-9100/Phone: (214) 830-1200.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Richard F. Auchter, grp pres-infant/child care; Paul S. Geisler, grp pres-feminine/adult care; Dudley Lehman, pres-infant care sector; Steven R. Kalmanson, pres-child care sector; Ronald R. Zwisler, pres-adult care sector; Kathi P. Seifert, pres-feminine care sector; David R. Murray, pres-svc and ind sector; John S. Metz, pres-professional healthcare sector; Jim McCauley, acting pres-nonwoven sector

Roy Plaut Jr., pres-specialty prods; Sean T. Erwin, pres-tech paper; Terry E. Kinnamon, pres-Neenah paper; Benjamin H. Knight, pres-U.S. pulp/newsprint.

CONSUMER PRODUCTS: 2100 Winchester/Neenah, Wis. 54956/Phone: (414) 721-2000.

Depends incontinence prods: Campbell-Mithun-Esty, Minneapolis. Beth Miller, sr vp-mgmt super.

Kleenex, Kleenex Premium, Softique facial tissues, bath tissues: Foote, Cone & Belding, Chicago. Dan Fox, exec vp-grp acct dir; Terry Peigh, vp-mgmt dir and worldwide acct dir; Pam Smith, vp-acct dir.

Huggies, Pull-Ups: Ogilvy & Mather, New York. David Mechlin, sr vp-worldwide client svcs dir; Don Blashford, vp-mgmt super.

Kotex, Lightdays, New Freedom feminine prods: Ogilvy & Mather, New York. Cynthia Round, sr vp-exec grp dir; Lorrie Idema, vp-mgmt super.

RANK: 21

Kmart Corp.

Troy, Mich.

Ad spending: $527.2 million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	27,478	55,343	-50.3
Sunday magazine	6,864	6,566	4.5
Newspaper	39,332	80,712	-51.3
Outdoor	231	60	282.6
Network TV	54,458	42,185	29.1
Spot TV	29,555	24,341	21.4
Syndicated TV	6,186	2,505	146.9
Cable TV networks	3,989	3,185	25.2
Network radio	11,014	10,970	0.4
Spot radio	10,676	5,292	101.7
Measured media	189,782	231,159	-17.9
Unmeasured	337,400	332,600	1.4
Total	527,182	563,759	-6.5
By top brands	**1991**	**1990**	**% chg**
Kmart misc. mdse	85,826	85,878	-0.1
Kmart	26,528	42,498	-37.6
Kmart apparel	21,249	22,058	-3.7
Kmart sport, toy, hobby	11,144	22,819	-51.2
Builders Square	10,332	21,651	-52.3
Kmart automotive	8,992	12,670	-29.0
Payless drug stores	7,386	5,995	23.2

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	34,580	32,070	7.8
Earnings	859	756	13.6
U.S.	**1991**	**1990**	**% chg**
Sales	33,520	30,971	8.2
Operating income	1,612	1,422	13.4
Division sales	**1991**	**1990**	**% chg**
General mdse	25,548	24,891	2.6
Specialty retail	9,032	7,179	25.8

CORPORATE PROFILE

Kmart, one of the few mass retailers to record a strong performance in the past year, has stepped up its promotional and in-store media activities at the expense of media advertising.

The marketing mix seems to be working. In first half 1992, Kmart showed an 8.5% increase in sales to $17.1 billion, with same-store sales up 3.3% over the prior-year period.

Kmart, which cut media spending 17.9% in 1991, premiered a satellite-driven, in-store radio network last June that offers music, news, commercials and promotions.

Kmart in 1991 built its cross-promotions arsenal to include CBS, Walt Disney Co., Eastman Kodak Co., Chrysler Corp., Coca-Cola Co. and Burger King Corp. Some of these tie-ins helped Kmart survive a dismal 1991 holiday season for many retailers by generating a 4% growth in same-store sales in December.

The retailer continued its foray into food sales, expanding Super Center operations. The 150,000-square-foot Kmart Super Center in Medina, Ohio, is expected to be joined by two more stores by the end of 1992.

Specialty retail outlets continue to be a boon for Kmart, generating more than $9 billion in sales last year, up 25.8%, and $245 million in operating income, up 48.4%. Builders Square, up 8.4% in sales to $2 billion, launched a high-profile national ad campaign starring comedian Tim Allen from TV's "Home Improvement."

HEADQUARTERS

Kmart Corp./3100 W. Big Beaver Road/Troy, Mich. 48084/Phone: (313) 643-1000.

PERSONNEL, BRANDS, AGENCIES

KMART STORES: 3100 W. Big Beaver Road/Troy, Mich. 48084/Phone: (313) 643-1000. Michael Wellman, vp-mktg; Gerald Habeck, vp-adv.

Kmart stores: Ross Roy, Bloomfield Hills, Mich. Peter Vetowich, exec vp-dir, retail operations.

Black consumer adv: Burrell Advertising, Chicago. Charles Curry, pres-coo.

Hispanic consumer adv: Castor Adv. Corp, New York. Rosemary Fiallos, acct exec.

WALDENBOOKS CO.: 201 High Ridge Road/Stamford, Conn. 06905; P.O. Box 10218/Stamford, Conn. 06904/Phone: (203) 352-2000. Steven Morvay, vp-mktg.

Waldenbooks stores: In-house.

Basset Book Shops: Grace & Rothschild, New York. Gordon "Chip" Sleeper, exec vp.

Preferred Reader: Stromberg-Conners Communications, Rye Brook, N.Y. Hank Stromberg, pres.

BUILDERS SQUARE: 9725 Datapoint/San Antonio, Texas 78229/Phone: (512) 616-8000. Frederick Meiser, sr vp-mktg.

Builders Square stores: Ross Roy, Bloomfield Hills, Mich. Peter Vetowich, exec vp-dir, retail

THE SPORTS AUTHORITY: 3383 N. State Road/Fort Lauderdale, Fla. 33319/Phone: (305) 735-1701. William Lehrburger, dir-mktg/adv.

The Sports Authority stores: Ross Roy, Bloomfield Hills, Mich., Peter Vetowich, exec vp-dir, retail operations.

PAY LESS DRUGSTORES NORTHWEST: 9275 S.W. Peyton Lane/Wilsonville, Ore. 97070/Phone: (503) 682-4100. Vince Osborne, vp-mktg.

Pay Less Drug Stores: J. Walter Thompson USA, Detroit. Cliff Campeau, vp-mgmt super.

PACE MEMBERSHIP WAREHOUSE: 5680 Greenwood Plaza Blvd./Englewood, Colo. 80111/ Phone: (303) 843-8000. Brad Gordon, exec vp-sales.

PACE Warehouse stores: In-house. **Media buying:** Reich Communications, Aurora, Colo. Christa Reich, pres.

OFFICEMAX: 1545 Golden Gate Plaza/Mayfield Hts., Ohio 44124/Phone: (216) 446-0200. George Seitzinger, dir-mktg and sales promo.

OfficeMax: Ross Roy, Bloomfield Hills, Mich. Peter Vetowich, exec vp-dir, retail operations.

RANK: 78

Levi Strauss & Co.

San Francisco

Ad spending: $129.4 million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	6,905	8,389	-16.7
Sunday magazine	0	5	NA
Newspaper	0	32	NA
Outdoor	2,576	89	NA
Network TV	16,678	22,019	-24.3
Spot TV	3,060	10,472	-70.8
Syndicated TV	11,745	12,200	-3.7
Cable TV networks	12,476	12,672	-1.5
Spot radio	286	184	55.2
Measured media	53,806	66,060	-18.5
Unmeasured	75,600	92,800	-18.5
Total	129,406	158,860	-18.5
By top brands	**1991**	**1990**	**% chg**
Levi's sportswear	42,627	60,096	-29.1
Dockers sportswear	10,811	2,378	354.7

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	4,900	4,250	15.3
Earnings	348	251	38.6
U.S.	**1991**	**1990**	**% chg**
Sales	2,982	NA	NA

CORPORATE PROFILE

The dark economic cloud of 1991 had a bright blue lining for jeans marketers, including Levi Strauss & Co.

Last year marked the first time in five years that the closely held denim giant had growth from its core jeans business.

Executives attribute growth in the stagnant denim arena to cautious consumers turning from trendy togs to time-proven wardrobe staples.

Levi's last year remained the No. 1 brand in the jeans market, with a 19% unit market share, same as 1990. VF Corp. boosted its market share slightly in the same period, to a combined 25.6% share for its Wrangler and Lee brands.

To capitalize on the back-to-basics mood, Levi this summer started a new $25 million ad campaign for 550 and 560 loose-fitting jeans.

The aim is to sell the new styles to both fashion followers now buying jeans from The Gap, and men over 25 who've outgrown Levi's slim-cut 501 model.

The campaign represents an increase of 48.7% in Levi's media spending for 1991.

The company total media spending in 1992 should come close to $80 million. The "loose jeans" campaign is bringing Levi's back to network TV where it is using the theme, "A loose interpretation of the original."

The marketing effort for 550 and 560 jeans is overseen by Steve Goldstein, who in February moved to consumer marketing director in the men's jeans division. Previously, Mr. Goldstein introduced the same 25-to-49-year-old population segment to Dockers.

Levi's this summer also broke a new $20 million 501 effort themed "Got to be real." Directed by Leslie Dektor, the TV spots harken back to Levi's "501 Blues" campaigns of the late '80s.

Levi's began charting a new course for Dockers in 1992, dropping the stream-of-consciousness campaign of the past five years for a color-driven TV and print effort themed "Nobody does color like Dockers."

The $800 million Dockers brand this fall will get a push from Johnston & Murphy Co., which is supporting its line of licensed Dockers shoes with a national print campaign from Griffin Bacal, New York.

HEADQUARTERS

Levi Strauss & Co./Levi's Plaza/1155 Battery St./San Francisco, Calif. 94111/Phone: (415) 544-6000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: David Schmidt, vp-mktg; Linda Aletto, dir-consumer mktg; Robert Hanson, consumer mktg dir-men's wear; Julie Palley, consumer mktg dir-youthwear; Steve Goldstein, consumer mktg dir-men's jeans; Jim Chriss, vp-mktg and sales-women's wear; Jim McCarty, consumer mktg dir-Brittania Sportswear.

Corporate adv, Levi's, Dockers, Brittania: Foote, Cone & Belding, San Francisco. Jack Rooney, sr vp-grp mgmt super.

Hispanic adv: Mendoza, Dillon & Asociados, Newport Beach, Calif. Randy Ransom, vp.

RANK: 79

Loews Corp.

New York

Ad spending: $129.0 million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	26,473	34,536	-23.3
Sunday magazine	2,160	14,787	-85.4
Newspaper	1,496	4,676	-68.0
Outdoor	34,997	39,032	-10.3
Network TV	0	35	NA
Spot TV	22	19	13.2
Cable TV networks	0	268	NA
Network radio	6,767	10,579	-36.0
Spot radio	35	50	-29.7
Measured media	71,951	103,981	-30.8
Unmeasured	57,000	82,400	-30.8
Total	128,951	186,381	-30.8

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By top brands	1991	1990	% chg
Newport cigarettes	43,602	52,390	-20.2
Kent cigarettes	14,221	9,991	42.3

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	13,620	12,637	7.8
Earnings	904	805	12.4
Division sales	**1991**	**1990**	**% chg**
Property, casualty insurance	8,479	7,517	12.8
Life insurance	2,632	2,425	8.6
Cigarettes	2,010	1,891	6.2
Hotels	201	240	-16.3
Watches, timing devices	164	182	-9.7
Shipping	11	125	-91.0

CORPORATE PROFILE

Loews Corp.'s Lorillard division spent $59 million in media to support its cigarette lines in 1991, a 31.4% drop that reversed its year-earlier media strategy and couldn't protect its market share.

Lorillard, the fourth-largest tobacco marketer in the U.S., dropped 7% in volume sales, a decline that cost it 0.3 share point in the tobacco market, according to John C. Maxwell Jr., an analyst with Wheat, First Securities.

The cigarette operation is increasingly dependent on full-price Newport, which dropped 1% by volume; in 1991, it accounted for 65% of Lorillard's sales, up 4 percentage points from a year earlier.

Newport's share of market was 4.7%, flat for the third consecutive year, as media support dipped 18% from 1990 levels.

Kent got a 30% boost in media spending but still ended the year down 16.9% by volume at a 1.6% share. Lorillard continued Kent's "Portraits of Pleasure" campaign, which was implemented following a redesign of all Kent packaging in 1990.

Ad support for the value-price Heritage brand plummeted 98% in 1991 to only $167,600, according to LNA/Arbitron Multi-Media Service.

The company moved Style out of test and onto the national stage with a $5.2 million budget and test-marketed Old Gold Filter. Both are value-price brands.

Loews' Bulova Co. upped its ad spending 4%, although support is minor compared to that drawn by its tobacco lines.

HEADQUARTERS

Loews Corp./667 Madison Ave./New York, N.Y. 10021-8087/Phone: (212) 545-2000.

PERSONNEL, BRANDS, AGENCIES

LORILLARD: One Park Ave./New York, N.Y. 10016/Phone: (212) 545-3000. M.L. Orlowsky, sr vp-adv/brand mgmt; G.R. Telford, vp-adv/brand mgmt; L.M. Giordano, media dir; R.G. Ryan, sales promo dir.

Newport, new products: Ally & Gargano, New York. Ed Ricci, exec vp.

Kent, Kent III, Kent Golden Lights, new products: Avrett, Free & Ginsberg, New York. Tom James, exec vp.

True, new products: Saatchi & Saatchi Advertising, New York. John Kaiser, exec vp.

LOEWS HOTELS: 667 Madison Ave./New York, N.Y. 10021/Phone: (212) 545-2000. Charlotte St. Martin, exec vp-operations/mktg; Christopher Rockett, pres-CLAS Intl; Marian Succoso, vp-adv.

Arias & Sarraille, Palo Alto, Calif. Lorilee Torrey, media dir.

CNA FINANCIAL CORP.: CNA Plaza/Chicago, Ill. 60685/Phone: (312) 822-5000. Peter P. Conway, sr vp-mktg; Himanshu Patel, asst vp-mktg support; Susan Stockton, adv mgr.

Frank C. Nahser Inc., Chicago. Tom Perlitz, sr vp; Terry Cross, vp-acct super; Wanda Zygmuntowicz, acct super.

BULOVA WATCH CO.: One Bulova Ave./Woodside, N.Y. 11377/Phone: (718) 204-3300. Philip Shaw, vp-mktg.

Weiss, Whitten Inc., New York. Jane Gundell, mgmt dir.

RANK: 34

R.H. Macy & Co.

New York

Ad spending: **$289.4** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	3,719	2,907	28.0
Sunday magazine	1,029	787	30.8
Newspaper	139,175	160,052	-13.0
Outdoor	295	130	127.5
Spot TV	44,417	13,451	230.2
Spot radio	89	178	-50.3
Measured media	188,723	177,503	6.3
Unmeasured	100,700	94,700	6.3
Total	289,423	272,203	6.3
By top brands	**1991**	**1990**	**% chg**
Macy's household	47,993	50,084	-4.2
Macy's misc. mdse	44,441	39,686	12.0
Macy's apparel	39,246	36,520	7.5
Bullock's apparel	11,864	7,573	56.7
Macy's jewelry	9,374	10,163	-7.8
I. Magnin & Co. apparel	7,939	9,050	-12.3
Bullocks	6,963	4,339	60.5
Macy's drugs & toiletries	6,361	8,398	-24.2
Bullock's household products	5,027	4,056	23.9

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	6,762	7,267	-7.0
Earnings	(150)	(147)	NA

CORPORATE PROFILE

When R.H. Macy & Co. began to splash "The magic of Macy's . . . we're a part of your life" ad campaign on spot TV in the spring of 1991, it came amid a rosy corporate prediction of a sales bonanza covering the next five years.

A modest sales growth in a tough year for retailers would have been magic, indeed. It didn't happen at Macy's. By yearend creditors were knocking on the door, and the company filed for bankruptcy protection in January. At the time of the filing, the venerable retailer had assets of $4.95 billion and liabilities of $5.32 billion.

Several days after the filing, Macy had a fiscal second-quarter loss of $671.6 million on sales of $2.1 billion, down 4.5%, for the period ended Feb. 1. Same-store sales declined 3.4% from the prior-year period. The huge loss included $606 million in one-time charges, about 35% of that related to consolidating its three divisions into two.

Macy's still spent heavily in 1991. It boosted spot TV to $44.4 million from $13.5 million. Newspaper spending remained heavy at $139 million, though down 13% from the prior year.

The bankruptcy left Macy's owing millions to newspapers and TV stations, and even its then-agency, Lintas:New York. Since Macy's handles its own media buying, Lintas escaped relatively unscathed by comparison. Now all work is done in-house.

Macy's reorganization plan eliminated the South division in Atlanta, leaving the West and East divisions. Macy's stores in Texas and its Bullock's chain will be administered by the West. All else will be under the East's supervision. The consolidation is expected to save the company $97 million a year. Macy's will close five I. Magnin outlets, and open two.

Other closings include all 34 of the Fantasies by Morgan Taylor lingerie outlets, 15 of 35 Charter Club women's apparel stores, three of 37 Aeropostale specialty clothing stores. Five new Aeropostales are planned for the Northeast.

Edward Finkelstein, who had engineered the $3.7 billion leverage buyout of Macy's in 1986, resigned as chairman-ceo this spring. He was succeeded by Myron E. Ullman III and Mark S. Handler. They share the titles.

HEADQUARTERS

R.H. Macy & Co./151 W. 34th St./New York, N.Y. 10001/Phone: (212) 695-4400.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Mark S. Handler, co-chmn and co-ceo; Myron E. Ullman III, co-chmn and co-ceo; Howard Adler, sr vp-sales promo/mktg; Audrey Nizen, vp-adv; Arthur E. Reiner, chmn-ceo, Macy's East; Burnett W. Donoho, vice chmn, Macy's East; Daniel Finkelstein, chmn, Macy's West; Rosemarie Bravo, chmn, I. Magnin & Co.; Donald Eugene, pres, I. Magnin & Co.

Macy's East: In-house. Steven Kornajcik and Joseph Garbarino, sr vps-sales promo; Nan Cooper, Robin Hall, adv vps.

Macy's West: In-house. Greg Hribar, sr vp-sales promo.

RANK: 69

Marriott Corp.

Washington

Ad spending: **$139.7** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	4,281	8,659	-50.6
Sunday magazine	471	224	110.4
Newspaper	20,279	16,220	25.0
Outdoor	1,082	1,442	-25.0
Spot TV	10,094	10,188	-0.9
Cable TV networks	2,955	1,458	102.7
Network radio	3,504	5,987	-40.0
Spot radio	6,175	7,012	-11.9
Measured media	48,911	51,180	-4.5
Unmeasured	90,800	88,400	2.7
Total	139,711	139,580	0.1
By top brands	**1991**	**1990**	**% chg**
Marriott hotels	25,499	27,644	-7.8
Courtyard hotels	7,729	7,096	8.9
Bob's Big Boy restaurants	5,661	6,960	-18.6

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	8,331	7,646	9.0
Earnings	82	47	74.5
Division sales	**1991**	**1990**	**% chg**
Lodging	4,379	3,942	11.1
Contract services	3,952	3,704	6.7

CORPORATE PROFILE

Despite one of the worst years ever for the hotel industry, Marriott Corp. maintained its occupancy rate, revenues and profits with only minimal cuts to its ad budgets in 1991.

Marriott spending in media declined 4.5% to $48.9 million. Hotels claimed $36.7 million of that, according to LNA/Arbitron Multi-Media Service. Restaurants, which the company is in the process of divesting, got the rest, mostly in spot TV.

Like much of the hotel industry, Marriott brands used advertised discounts to lure recession-weary travelers to its abundant supply of empty rooms in 1991.

The company's units are Marriott Hotels, Resorts & Suites, its full-service luxury chain; Courtyard, a moderately priced chain; Residence Inn, an extended-stay business hotel; and Fairfield Inn, an upper-end economy hotel.

Overall occupancy for Marriott ran from the lower to upper 70% range in 1991. By comparision, average occupancy rates for the hotel industry fell to 60.8% in 1991, the lowest in 20 years.

HEADQUARTERS

Marriott Corp./One Marriott Drive/Washington, D.C. 20058/10400 Fernwood Road/Bethesda, Md. 20817/Phone: (301) 380-9000.

PERSONNEL, BRANDS, AGENCIES

LODGING OPERATIONS: One Marriott Drive/Washington, D.C. 20058;10400 Fernwood Road/Bethesda, Md. 20817/Phone: (301) 380-9000. Stephen P. Weisz, sr vp-sales & mktg, hotels/resorts/suites; Jacqueline Hurley, dir-natl adv/field mktg, hotels/resorts/suites; Craig Lambert, vp-mktg Courtyard and Fairfield Inn div; John Greenleaf, mktg dir-Courtyard; Steve Biggerstaff, mktg dir-Fairfield Inn; Rufus Schriber, vp-mktg & sales Residence Inn.

Marriott hotels, resorts, suites: FCB/Leber Katz Partners, New York. Dorian Rogers, acct exec.

Residence Inn: Martin Agency, Richmond, Va. Dan Bartges, vp-acct super.

Courtyard: Scali, McCabe, Sloves, New York. John Bowen, acct exec.

Fairfield Inn: Eisner & Associates, Baltimore. Peter Gladstone, vp-acct super.

RESTAURANT OPERATIONS: One Marriott Drive/Washington, D.C. 20058/Phone: (301) 380-9000. Jack McCarthy, sr vp; Jon Jameson, vp-mktg.

Morey & Waddell, Indianapolis. Cheryl Bohn, acct exec.

RANK: 38

Mars Inc.

McLean, Va.

Ad spending: **$253.9** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	12,315	3,532	248.6
Newspaper	997	837	19.1
Outdoor	239	272	-12.2
Network TV	37,281	69,726	-46.5
Spot TV	30,377	39,002	-22.1
Syndicated TV	27,368	23,006	19.0
Cable TV networks	16,590	10,400	59.5
Network radio	1,704	657	159.5
Spot radio	1,373	1,386	-0.9
Measured media	128,245	148,618	-13.8
Unmeasured	125,700	123,600	1.7
Total	253,945	272,418	-6.8
By top brands	**1991**	**1990**	**% chg**
Uncle Ben's rice	18,103	13,140	37.8
M&Ms candies	16,183	14,017	15.5
PB Max candy bar	13,303	12,146	9.5
Snickers candy bar	12,076	8,939	35.1
Combos snacks	8,279	6,787	22.0
Milky Way	7,446	5,880	26.7
Twix	6,296	9,207	-31.6
Expert dry dog & cat food	6,043	0	NA
Starburst	5,314	5,067	4.9
Skittles	5,271	11,122	-52.6

CORPORATE PROFILE

M&M/Mars has been on a mission to reclaim its lead in the U.S. candy galaxy and with an array of new products is closing in on leader Hershey Chocolate U.S.A.

The unit of Mars Inc. had sales of $1.5 billion for the year ending March 31, 1992, up 4.5% from the prior-year period, according to Nielsen Marketing Research. Hershey had sales of $1.6 billion for the period, down 1.5%. Those shifts leave Hershey with a 26.6% share of the $6.2 billion U.S. candy market while M&M/Mars has a 24.5% share.

The strong growth at M&M/Mars was abetted by excellent sales of its new peanut butter-filled M&M's; the product claimed about half the year-to-year jump in revenues.

In April, M&M/Mars introduced on the West Coast Milky Way II, with 25% fewer calories, the first reduced-calorie, reduced-fat chocolate bar in its stable. The company took almost six years to develop the product and get it to match the taste of its regular Milky Way bar. Milky Way II will arrive on the East Coast this fall.

After tests in 1991, M&M's almond chocolate candies and Dove milk chocolate and dark chocolate bars rolled out nationally in 1992. M&M/Mars also introduced in 1992 Kudos Pan Squares home-style snacks aimed at the breakfast market.

M&M/Mars spent an estimated $85 million in media last year, down 19%, according to LNA/Arbitron Multi-Media Service. Brands that received major support were M&M's chocolate candies, PB Max and Snickers bars, and Combos snacks.

Spending on M&M's rose 19.4% to $16 million, reflecting the addition of the peanut butter-filled variety to the line.

Mars Inc. was an official worldwide sponsor of the 1992 Summer Olympics. All its divisions—M&M/Mars, Kal Kan, Uncle Ben's and Dove—participated. The company spent more than $200 million on Olympic advertising and promotions.

Mars' Dove International is the No. 1 player in the frozen novelties category. The Kal Kan Foods division moved into the No. 3 spot in the pet food market, valued at $4.7 billion retail. Kal Kan increased its share to 12.9% for the year ended Feb. 22, 1992, up from 12.4%, according to Nielsen.

Kal Kan cut ad spending by 37% in 1991, to $18.7 million.

HEADQUARTERS

Mars Inc./6885 Elm St./ McLean, Va. 22101/ Phone: (703) 821-4900.

PERSONNAL, BRANDS, AGENCIES

M&M/MARS DIV: High Street/ Hackettstown, N.J./ 07840/Phone: (908) 852-1000. Mary Anne Donovan, vp-franchise; Terence Stephens, sr vp-sales.

M&M's, Snickers, 3 Musketeers, Kudos, Holidays, PB Max, Starburst, new products: Backer Spielvogel Bates Worldwide, New York. Jerrold Gottlieb, exec vp-acct mgmt.

Bounty, Combos, Mars Milky Way Bar, Mars Almond Bar, Skittles, Twix: D'Arcy Masius Benton & Bowles, St. Louis. David Gulick, exec vp-acct mgmt.

Dove chocolate bars: Grey Advertising, New York. Warren Fisher, sr vp.

KAL KAN FOODS: 3250 E. 44th St./ Vernon, Calif. 90058/Phone: (213) 587-2727. Vreij Kolandjian, vp-franchise.

Pedigree dog food, Sheba cat food, new products: Backer Spielvogel Bates Worldwide. Bob Kozlowicz, vp-sales.

Whiskas cat food: D'Arcy Masius Benton & Bowles, Los Angeles. Clive Pinder, vp-acct super.

UNCLE BEN'S INC.: 5721 Harvey Wilson Dr./Houston, Texas 77020/Phone: (713) 674-9484. Michael Owen, franchise dir.

Branded white rices, branded prepared rices, Uncle Ben's Cookin' Sauces, new products: Backer Spielvogel Bates Worldwide, New York. Alice Uniman, sr vp-mgmt rep.

DOVE INTERNATIONAL: 660 W. 79th St./ Burr Ridge, Ill. 60521/Phone: (708) 850-9898. William Del Chiaro, vp-franchise.

Dove ice cream bars, Dove bite-size ice cream snacks: Grey Advertising, New York. Warren Fisher, sr vp.

Milky Way ice cream bars/milk shakes: D'Arcy Masius Benton & Bowles, New York. David Gulick, exec vp-acct mgmt.

Snickers ice cream bars, 3 Musketeers ice cream bars: Backer Spielvogel Bates Worldwide, New York. Jerrold Gottlieb, exec vp-acct mgmt.

RANK: 33

Matsushita Electric Industrial Co.

Secaucus, N.J.

Ad spending: **$292.3** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	19,220	26,408	-27.2
Sunday magazine	2,407	32	NA
Newspaper	21,080	34,054	-38.1
Outdoor	3,298	4,030	-18.2
Network TV	43,270	42,711	1.3
Spot TV	33,902	39,481	-14.1
Syndicated TV	11,716	8,070	45.2
Cable TV networks	5,975	4,740	26.0
Network radio	307	506	-39.4
Spot radio	4,903	5,969	-17.9
Measured media	146,086	166,000	-12.0
Unmeasured	146,200	166,200	-12.0
Total	292,286	332,200	-12.0
By top brands	**1991**	**1990**	**% chg**
Universal City Studios	91,882	111,287	-17.4
Panasonic video equipment	16,474	8,286	98.8
Universal Studios tours	9,463	11,121	-14.9
MCA home videos & discs	5,371	11,086	-51.5

SALES & EARNINGS ($ in millions)

Worldwide	1992	1991	% chg
Sales	56,015	46,804	19.7
Earnings	980	1,836	-46.6
Division sales	**1992**	**1991**	**% chg**
Video equipment	12,780	12,162	5.1
Audio equipment	4,750	4,240	12.0
Home appliances	7,385	6,379	15.8
Communications, industrial	12,621	11,017	14.6

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S welling in one or more joints
E arly morning stiffness
R ecurring pain or tenderness in any joint
I nability to move a joint normally
O bvious redness and warmth in a joint
U nexplained weight loss, fever or weakness combined with joint pain
S ymptoms like these persisting for more than two weeks

If you have these warning signs, consult your family physician or rheumatologist, contact the Arthritis Foundation office nearest you, or call 1-800-283-7800.

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Division sales	1991	1990	% chg
Electronic components	6,487	5,980	8.7
Batteries & kitchen-related	2,765	2,478	11.6
Other	4,517	4,558	-0.9
Entertainment (MCA)	4,709	NA	NA

CORPORATE PROFILE

Matsushita Electric Industrial Co. may be suffering more than a little indigestion from its late 1990 acquisition of MCA.

The $6.13 billion purchase, the largest-ever Japanese acquisition of a U.S. company, helped boost the electronics giant's fiscal 1992 sales, but earnings took a beating.

For the year ended March 31, worldwide revenues increased about 19.7% and net income plunged 45.6%. The trend continued through the first quarter of the current fiscal year. Sales increased 12% to $12.8 billion, and net earnings dropped 34% to $277 million.

Despite the earnings decline, Matsushita is committed to marrying its key business of consumer electronics hardware with software, primarily films from former MCA unit Universal Studios.

Universal's overall share of the U.S. box office take in 1991 dropped to 11%, ranking it fifth. That marks the second year of a slide; in 1989, Universal's share hit 16.6%, placing it second behind Warner Bros. Movies were backed with $91.9 million in media in 1991, down 17.4% from the prior year, according to LNA/Arbitron Multi-Media Service.

For the first six months of this year, Universal bounced back to third place, with 13.5% of the box office take.

On the consumer electronics front, industry growth of camcorder sales has been slowing. While sales leader Sony Corp. of America and others moved to the new technology featuring 8mm cameras, Matsushita's Panasonic Co. unit fought back with a $10 million-plus campaign promoting "regular" VHS and VHS-C compatible cameras. Panasonic has remained No. 2, behind Sony.

The only other Panasonic consumer electronics product to get significant ad support was the wet/dry shaver, introduced in 1990. Spending in 1991 increased almost 30% to $4.9 million.

HEADQUARTERS

Matsushita Electric Trading Co./CPO Box 288 Central/Osaka, Japan.

Matsushita Electric Corp. of America/One Panasonic Way/Secaucus, N.J. 07094/Phone: (201) 348-7000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Grey Advertising, New York, Stewart Hegleman, exec vp.

PANASONIC CO.: One Panasonic Way, Secaucus, N.J. 07094/Phone: (201) 348-7000. Robert Greenberg, vp-gm, comms.

Panasonic video, audio, home office, Technics: Grey Advertising, New York. Stewart Hegleman, exec vp.

Panasonic personal care prods: Martin Marshall Jaccoma Mitchell, New York. Julie Krueger, vp.

PANASONIC INDUSTRIAL CO.: One Panasonic Way/Secaucus, N.J. 07094/Phone: (201) 348-7000. Sayo Inai, mgr-comms.

Panasonic batteries, business telephones, data collection computers: Grey Advertising, New York. Stewart Hegleman, exec vp.

PANASONIC COMMUNICATIONS & SYSTEMS CO.: One Panasonic Way/Secaucus, N.J. 07094/Phone: (201) 348-7000.

Panasonic cellular & paging prods: Slater, Hanft, Martin, New York. Anthony Parks, account super.

Panasonic copiers, facsimiles, laser printers, optical disks, scanners, dot matrix printers, laptop computers, monitors, electronic typewriters, document filing systems, office automation showrooms: Foote, Cone & Belding, Philadelphia. Tom Tebbens, sr vp-exec dir.

Panasonic business equipment: Grant Marketing, Lafayette Hill, Pa. Sed Wilson, sr vp-mktg/media.

QUASAR CO.: 1707 N. Randall Road/Elgin, Ill. 60123-7847/Phone: (708) 468-5600. Matt Omoto, gm-mktg, electronics; John Monaco, gm-mktg, appliances; Dave Bearden, gm-sales.

In-house.

MCA INC.: 100 Universal City Plaza, Universal City, Calif. 91608/Phone (818) 777-1000.

Universal Pictures Mktg: Simon Kornblit, exec vp-worldwide mktg; Sally Van Slyke, sr vp-mktg, natl publicity, promo/field operations; David Sameth, sr vp-mktg, creative adv and vp-creative affairs; Perry Katz, sr vp-mktg, mktg rsch; Nadia Bronson, vp-intl publicity/adv; Robert Crutchfield, sr vp-publicity, promo and adv-Universal Television; Morton A. Slakoff, sr vp-creative svcs, MCA TV; Peter G. Hughes, vp-mktg, MCA TV International; Andrew Kairey, vp mktg-MCA/Universal Home Video. Randy Miller, sr vp mktg-MCA Music Entertainment Grp; Dennis Jarvis, vp-mktg, Spencer Gifts; Sheri Herman, vp adv-Universal Studios Hollywood; David Miller, adv dir; Barbara Ochoa, media mgr. Randy Garfield, exec vp-mktg, Universal Studios Florida.

Universal Pictures: DDB Needham Worldwide, Los Angeles. Ken Kaess, exec vp.

MCA/Universal Home Video: Focus Media, Studio City, Calif. Gary Tobey, pres; Margaret Bogenschutz, assoc media dir; Stacey Goode, media planner.

Universal Studios Hollywood, Universal Studios Florida: Seineiger Advertising, Los Angeles. Hall Kaufman, acct exec.

WINNER,
1992 National Magazine Award,
General Excellence
THE NEW REPUBLIC

RANK: 35

May Department Stores Co.

St. Louis

Ad spending: **$277.3** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	3,421	3,811	-10.2
Sunday magazine	3,900	4,663	-15.1
Newspaper	155,172	218,239	-28.9
Outdoor	56	155	-63.6
Network TV	7,716	7,447	3.6
Spot TV	18,586	22,937	-19.0
Syndicated TV	424	0	NA
Cable TV networks	1,730	428	303.8
Spot radio	3,036	2,444	24.2
Measured media	194,101	260,125	-25.4
Unmeasured	83,200	111,500	-25.4
Total	277,301	371,625	-25.4
By top brands	**1991**	**1990**	**% chg**
May Co. apparel	19,511	22,127	-11.8
May Co. misc. mdse	17,164	22,865	-24.9
Payless shoes	15,406	16,609	-7.2
Lord & Taylor apparel	13,485	27,686	-51.3
May household prods	13,147	15,952	-17.6
Foley's apparel	11,926	15,466	-22.9
Robinson's apparel	10,902	9,947	9.6
Filene's apparel	8,362	11,574	-27.8
Filene's institutional	8,083	10,534	-23.3
Robinson's misc. mdse.	6,634	5,946	11.6
Foley's household	6,047	8,511	-29.0
Lord & Taylor misc.	5,661	8,548	-33.8

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	10,402	9,857	5.5
Earnings	515	500	3.0
Division sales	**1991**	**1990**	**% chg**
Department stores	8,854	8,491	4.3
Payless ShoeSource	1,548	1,366	13.3

CORPORATE PROFILE

May Department Stores Co. continues to lean on its specialty business, Payless ShoeSource, as its big-volume department store division struggles through the economic malaise.

Payless grew by 13.3% in sales during the fiscal year ended Jan. 31, 1992, and matched exactly that growth in the first six months of the current fiscal year largely as a result of expansion. Store-for-store sales in the shoe chain grew 3.8% in the six months vs. 2.6% for calendar 1991.

The department store unit, paced by Lord & Taylor, Foley's and Hecht's, has fallen further behind in same-store sales, off 1.6% for the first half compared with a 0.3% drop for all of 1991.

Thalhimer's, May's November 1990 acquisition, was folded into Hecht's in February. L.S. Ayres was consolidated into Famous-Barr at the same time.

In all company operations, measured media fell 25% to $194.1 million, according to LNA/Arbitron Multi-Media Service. Hecht's recorded one of the deepest drops, a 65% cut to $11 million in media. Filene's spending dropped 15% to $23 million, and Lord & Taylor dropped 44% to $22 million.

Payless ShoeSource, a 3,295-store chain that opened 328 new outlets in 1991, was backed with $17 million in media, the same as in 1990.

HEADQUARTERS

May Department Stores Co./611 Olive St./St. Louis, Mo. 63101/Phone: (314) 342-6300.

PERSONNEL, BRANDS, AGENCIES

FAMOUS-BARR/ST. LOUIS: 601 Olive St./St. Louis, Mo. 63101/Phone: (314) 539-8600. Paul G. Cavalli, sr vp-sales promo, in-house; Vicki Rosenkoetter, vp-adv dir, in house.

FILENE'S/BOSTON: 426 Washington/Boston, Mass. 02101/Phone: (617) 357-2100. Stephen Thorpe, sr vp-adv/sales promo, in-house; Joseph Panessidi, div vp-adv, in-house.

FOLEY'S/HOUSTON: 1110 Main St./Houston, Texas 77002/P.O. Box 1971/Houston, Texas 77251/Phone: (713) 651-7038. Linda Knight, sr vp-mktg, in-house.

G. FOX: 960 Main St./Hartford, Conn. 06115/Phone: (203) 522-1920. Joseph Civitillo, sr vp-sales promo, in-house; Raina D'Amico, vp-creative dir, in-house.

HECHT'S/WASHINGTON, D.C.: 685 N. Glebe Road/Arlington, Va. 22203-2199/Phone: (703) 558-1200. Steven E. Wishnow, sr vp-adv/sales promo, in-house.

KAUFMANN'S/PITTSBURGH: 400 Fifth Ave./Pittsburgh, Pa. 15219/Phone: (412) 232-2000. Jerry J. Eccher, sr vp-sales promo, in-house.

LORD & TAYLOR/NEW YORK: 424 Fifth Ave./New York, N.Y. 10018/Phone: (212) 391-3344. Rita Lennick, sr vp-adv/sales promo, in-house.

MAY CO., CALIF.: 6160 Laurel Canyon Blvd./No. Hollywood, Calif. 91606-3247/Phone: (818) 508-5226. Mark Humphrey, sr vp-adv/sales promo, in-house. Karen Jones, div vp-adv dir.

MAY CO., OHIO: 158 Euclid/ Cleveland, Ohio 44114/Phone: (216) 664-6000. Jerry W. Hoegner, sr vp-sales promo, in-house.

MEIER & FRANK: 621 S.W. Fifth Ave./Portland, Ore. 97204/Phone: (503) 223-0512. David E. Miller, sr vp-sales promo, in-house. Nancy Altman, adv dir.

ROBINSON'S: 600 W. Seventh St./Los Angeles, Calif. 90017/Phone: (213) 488-5522. Judy Farris, sr vp-adv/sales promo, in-house. Marcia Tabler, vp-creative dir.

PAYLESS SHOESOURCE: 3231 E. Sixth St./Topeka, Kan. 66607/Phone: (913) 233-5171. Terry McDonald, sr vp-adv/sales promo.

Foote, Cone & Belding, Chicago. Paul Vernon, sr vp-grp acct dir.

RANK: 48

Mazda Motor Corp.

Hiroshima

Ad spending: **$215.0** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	46,412	48,526	-4.4
Sunday magazine	515	37	NA
Newspaper	2,376	6,144	-61.3
Outdoor	654	2,153	-69.6
Network TV	68,761	76,059	-9.6
Spot TV	35,440	43,297	-18.1
Syndicated TV	1,651	1,742	-5.3
Cable TV networks	972	946	2.7
Spot radio	437	2,256	-80.6
Measured media	157,218	181,162	-13.2
Unmeasured	57,800	66,700	-13.3
Total	215,018	247,862	-13.3
By top brands	**1991**	**1990**	**% chg**
Mazda cars	146,074	154,116	-5.2
Mazda trucks	10,700	26,866	-60.2

SALES & EARNINGS ($ in millions)

Worldwide	1992	1991	% chg
Sales	NA	15,800	NA
Earnings	NA	191	NA

CORPORATE PROFILE

Mazda Motor Corp., in the midst of a heavy new-product phase that will climax with the launch of the Amati luxury car in the 1994 model year, gained share points in a declining market in 1991 despite slipping in unit sales.

Mazda is expected to stimulate advertising, which in 1991, dropped below 1990 levels. Part of its ad arsenal is a new regional marketing program that began this month that will match all association ad costs dollar for dollar, with no limits.

The Japanese auto marketer in mid-January named Lord, Dentsu & Partners, New York and Los Angeles, as agency for the estimated $60 million to $70 million Amati account.

In a year in which total industrywide car and light-truck sales fell 11.3% in the U.S., Mazda Motor of America gained share points despite a sales decline of 1.7% to 343,612 units for the U.S. subsidiary. Its share rose to 2.8% from 2.5% in the U.S. car and light-truck market, according to *Automotive News*.

At midyear 1992, Mazda's total car and light-truck sales were off 2.8% on sales of 131,594 cars, up 6.6%, and 176,428 trucks, down 2.8%.

Mazda's intermediate 626 was the company's best seller in 1991, with sales of 68,369 units, up 6.4%. It drew $17.8 million in media, down 20.8%, and virtually all in network and spot TV, according to LNA/Arbitron Multi-Media Service.

The 1992 model lineup included the redesigned 929 and the MX3 subcompact. The 929 got the lion's share of media spending—$28.7 million, up from $7.6 million, LNA noted.

The company's second-best seller was the subcompact Protege, which accounted for sales of 53,474, up 12.8%. The model got a comparatively meager $2.2 million in media. The Miata sports car, with sales of 4,667 units in just four months last year, got $17.4 million in ad dollars; the MPV minivan, which sold 48,117 units, up 11.6%, accounted for $20.5 million in ad support.

Mazda this spring earmarked an estimated $70 million for its new MX-6 and the 626. To maintain sales momentum this year, in mid-June the company turned on the playful "Mazda Mania" commercials designed to look like movies and offering $1,400 cash back on the Protege plus other free options.

Midyear also saw the start of an expanded direct mail campaign designed to encourage the test driving of Mazdas. The program was teamed with 22 magazines in which the test drive offer was tied to events connected with the magazines' editorial.

HEADQUARTERS

Mazda Motor of America/7755 Irvine Center Drive/Irvine, Calif. 92718/Phone: (714) 727-1990.

Amati Division, 195 Technology, Irvine, Calif. 92718/Phone: (714) 753-7100.

PERSONNEL, BRANDS, AGENCIES

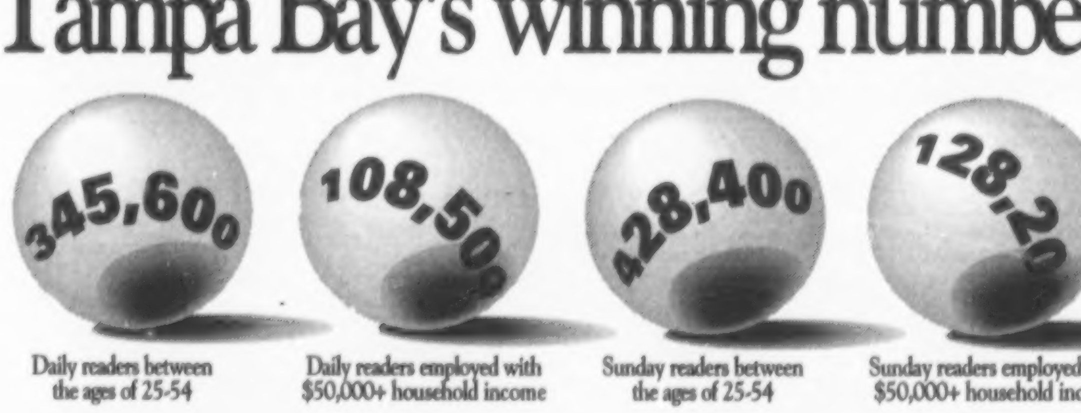
CORPORATE: Mazda Autos: Kazuo Sonoguchi, pres; Clark Vitulli, sr vp-coo; Jan Thompson, vp-mktg; Richard Balsiger, adv dir.

Amati Autos: Richard Colliver, grp vp-gm; John Kramer, mktg dir; Susan Huhndorf, adv mgr.

Mazda: Foote, Cone & Belding, Santa Ana, Calif. William Hagelstein, exec vp-gm.

Amati: Lord, Dentsu & Partners, Los Angeles, Calif. Paul Katzka, sr vp-mgmt super.

Tampa Bay's winning numbers.



Daily readers between the ages of 25-54

Daily readers employed with $50,000+ household income

Sunday readers between the ages of 25-54

Sunday readers employed with $50,000+ household income

In Florida, the Tampa Bay market ranks first in population, households, retail and food store sales and the advertising vehicle that's number one in reaching adults in prime buying ages and incomes is The Tampa Tribune.

Tampa Bay's next-closest newspaper comes up short in all of these categories every day of the week. Which is why, as far as advertisers are concerned, nothing beats The Tampa Tribune.

To advertise, call Joe Gess, General Advertising Manager at (813) 272-7447. Represented nationally by Sawyer Ferguson Walker, Co.

The Tampa Tribune
Media General

Sources: 1991 Scarborough Study,
S & M M 1991 Survey of Buying Power

RANK: 8

McDonald's Corp.

Oak Brook, Ill.
Ad spending: **$694.8** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	6,248	3,291	89.8
Sunday magazine	4	4	-5.4
Newspaper	308	567	-45.8
Outdoor	6,947	5,167	34.4
Network TV	171,834	230,994	-25.6
Spot TV	149,055	145,986	2.1
Syndicated TV	32,979	28,009	17.7
Cable TV networks	16,224	8,795	84.5
Network radio	0	8	NA
Spot radio	3,787	3,604	5.1
Measured media	387 386	426,425	-9.2
Unmeasured	307,400	338,400	-9.2
Total	694,786	764,825	-9.2

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	6,695	6,640	0.8
Earnings	860	802	7.2
U.S.	**1991**	**1990**	**% chg**
Sales	3,710	3,871	-4.2
Operating income	1,000	986	1.5
Division sales	**1991**	**1990**	**% chg**
Company-operated restaurants	4,908	5,019	-2.2
Revenue from franchisees	1,787	1,621	10.2
Systemwide results	**1991**	**1990**	**% chg**
Company-operated restaurants	4,908	5,019	-2.2
Franchisees	12,959	12,017	7.8
Affiliates	2,061	1,723	19.6
Total systemwide sales	19,928	18,759	6.2

CORPORATE PROFILE

"What you want is what you get" is McDonald's Corp.'s latest advertising slogan, introduced in February, and increasingly what McDonald's has wanted for itself is change.

Chairman Michael Quinlan continues to loosen up what had been a slow-to-change company, and change has become the rule in its menu and marketing.

A major reason is that the sluggish economy and tougher competition in the quick-service restaurant industry have opened McDonald's eyes to change.

In 1991, McDonald's systemwide sales continued to rise, up 6% to $19.9 billion. But much of that increase came from new store openings, especially outside the U.S. Domestic sales rose 2.2%, while sales outside the U.S. advanced 13.9%. One dramatic indicator for McDonald's has been the slowdown in average-store sales, which grew less than 1% in 1991.

McDonald's share of the hamburger/sandwich category was 34%, off slightly from 34.4% in 1990, according to *Nation's Restaurant News*.

A response in 1991 was to make permanent a "value pricing" strategy that lowered prices on selected core items like hamburgers, cheeseburgers and children's Happy Meals. The strategy also involves continual promotion of a changing array of lower-price meal combinations.

Value Menu price reductions vary between regions and markets, making national menu advertising more difficult—one reason McDonald's network TV spending took a dive in 1991, dropping 34%.

In May 1992, McDonald's launched a massive outdoor ad campaign to promote the menu values. Its purchase of 20,000 outdoor locations nationwide, its first use of the medium for national brand advertising, was said to have been the largest single outdoor campaign ever launched. An expanded print campaign is planned for this year's fourth quarter.

McDonald's is also making moves to control its advertising media. This fall it will test *McMagazine*, an in-store publication produced with Quad Publishing. It's also developing with Turner Broadcasting System an in-store, ad-supported TV network, tentatively called McDTV.

The menu continues to change. Breakfast Burritos and Chicken Fajitas have found a home on the menu; pizza is in 500 stores and moving slowly toward national introduction; a dinner menu of baked chicken, pasta dishes and pizza was tried and sent back to the test kitchen; sub sandwiches, fried chicken wings and even an all-you-can-eat breakfast bar have been tested.

McDonald's has cut back on games and sweepstakes promotions but continues to run occasional promotional programs targeted to teens.

HEADQUARTERS

McDonald's Corp./One McDonald's Plaza/Oak Brook, Ill. 60521/Phone: (708) 575-3000

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Paul D. Schrage, sr exec vp-chief mktg officer; David B. Green, Richard G. Starrmann, sr vps-mktg; Roy Bergold, vp-adv; Ronald W. Miessler, vp-comms svcs; Jim Rand, vp-mktg svcs; Charles L. Rubner, vp-comms; Don Dempsey, asst vp-intl mktg; Linda Kravitz, Bill Lamar, asst vps-natl mktg; Sandy Silver, asst vp-mktg; Dean Barrett, asst vp-promo, sports & presence mktg; Jack Daly, asst vp-comms; Terri Capatosto, dir-media relations; Chuck Ebeling, dir-corp comms; Mike Gordon, dir-intl comms; George Griggs, dir-field mktg; Court Kenaston, dir-intl mktg; Thom Kettle, dir-new prods mktg; Jan Kramer, dir-real estate mktg; Roger Lipker, dir-comms; Don Lorr, dir-mktg rsch; Susan Clark McBride, dir-publications/customer relations; Bridget Marshall, dir-pr; Steve Nubie, dir-adv; Stephanie Skurdy, dir-education; Bruce Smith, dir-media.

McDonald's: Leo Burnett USA, Chicago. Jerry Connor, exec vp-client svcs dir. DDB Needham Worldwide, Chicago. Dick Rogers, exec vp-grp acct dir.

Black consumer mktg: Burrell Advertising, Chicago. Sarah Sears, vp-acct dir.

Hispanic consumer mktg: Castor Advertising, New York. Castor Fernandez, pres.

Sales promo: Frankel & Co., Chicago. Rick Bollinger, Bob Schneider, vps-mgmt reps. Simon Marketing, Oakbrook Terrace, Ill. Jay Babineau, exec vp.

Public relations: Golin/Harris, Chicago. Steve Crews, exec vp-acct dir. Burson-Marsteller, Chicago. John LeSage, exec vp-gm; Harlan Teller, exec vp-client svcs.

Black consumer public relations: Burrell Public Relations, Chicago. Tina Carol Gay, sr vp.

RANK: 70

MCI Communications Corp.

Washington
Ad spending: **$139.5** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	2,081	8,199	-74.6
Sunday magazine	13	235	-94.5
Newspaper	1,101	2,061	-46.6
Outdoor	423	22	NA
Network TV	76,387	33,095	130.8
Spot TV	7,887	7,377	6.9
Syndicated TV	311	544	-42.9
Cable TV networks	5,518	3,580	54.1
Spot radio	343	356	-3.7
Measured media	94,064	55,676	68.9
Unmeasured	45,400	26,900	68.8
Total	139,464	82,576	68.9

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	8,433	7,680	9.8
Earnings	551	299	84.3

CORPORATE PROFILE

MCI Communications Corp. gained a valuable share point in the hotly contested $56 billion long-distance market, riding the popularity of its discount calling plans that rewarded participating MCI customers and their friends, family and business associates.

MCI last May claimed its Friends & Family program elevated its market share to 16%. The nation's No. 2 long-distance carrier said it intends to grow further by outpacing the market in terms of 800-numbers, calling cards and data traffic. AT&T Co. holds a 68% share and Sprint, the other major player, has 9%.

Friends & Family was supported with more than $43 million in media, mostly TV, according to LNA/Arbitron Multi-Media Service. Extensive direct mail supported. Overall, MCI spends $100 million on its calling plans.

The company added Friends of the Firm for business customers.

HEADQUARTERS

MCI Communications Corp./1801 Pennsylvania Ave., NW/Washington, D.C. 20006/Phone: (202) 872-1600.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Bert C. Roberts Jr., chmn-ceo; Daniel Akerson, coo; Roy N. Gamse, sr vp-mktg, consumer mkts; John Gerdelman, sr vp-customer svc, consumer mkts; Abby Warner, sr mgr-adv.

Messner Vetere Berger Carey Schmetterer, New York. Audrey Epstein, acct exec; Christine Hayter, acct exec.

Devon Direct Marketing and Advertising, Berwyn, Pa. Ron Greene, mgmt dir.

RANK: 90

Mobil Corp.

New York
Ad spending: **$120.0** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	2,758	6,579	-58.1
Sunday magazine	34	19	82.7
Newspaper	3,562	3,236	10.1
Outdoor	16	11	44.2

1. Loose lips sink........................

2. Only you can prevent.............

3. A mind is a terrible..............

4. Friends don't let friends.........

5. Take a bite out of..................

6. Ad Council ads work because...

© 1992 The Advertising Council Inc.

IF YOU CAN FINISH THE FIRST FIVE LINES
THEN CERTAINLY YOU CAN FINISH THE SIXTH

WE'VE SUPPLIED THE ADS. THE MEDIA'S MADE THEM FAMOUS. SEE THE AD COUNCIL WORK. 212-922-1500, X 214.

Ad Council

By media	1991	1990	% chg
Network TV	9,835	9,790	0.5
Spot TV	13,023	14,455	-9.9
Syndicated TV	908	2,682	-66.1
Cable TV networks	1,116	1,579	-29.3
Network radio	0	239	NA
Spot radio	5,590	4,470	25.1
Measured media	36,843	43,060	-14.4
Unmeasured	83,200	97,200	-14.4
Total	120,043	140,260	-14.4
By top brands	**1991**	**1990**	**% chg**
Mobil gasoline & oil	25,671	24,296	5.7
Hefty storage bags	8,765	12,423	-29.4

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	63,227	64,472	-1.9
Earnings	1,920	1,929	-0.5
U.S.	**1991**	**1990**	**% chg**
Sales	20,006	21,006	-4.8
Earnings	334	415	-19.5
Division sales	**1991**	**1990**	**% chg**
Petro exploration, production	5,928	5,833	1.6
Petro marketing, refining	52,791	53,882	-2.0
Chemicals	3,953	4,084	-3.2

CORPORATE PROFILE

Domestic oil prices have been as soft as the general economy the past two years, socking Mobil Oil Corp. with a 1.9% decline in earnings.

Mobil's media budget also slumped in 1991, down 14.4% to only $36.8 million, including a 29.4% decline to $8.8 million in media for Hefty storage bags.

Mobil is expanding its Pegasus 21 stations, featuring a minimart and free standing car wash. In May 1991, Mobil applied a one-price policy to all gas purchases.

HEADQUARTERS

Mobil Corp./3225 Gallows Road/ Fairfax, Va. 22037-0001/Phone: (703) 846-3000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Allen E. Murray, chmn-pres-ceo. DDB Needham Worldwide, New York. Lawrence Iannuzzelli, exec vp.

MOBIL OIL CORP.: 3225 Gallows Road/Fairfax, Va. 22037/Phone: (703) 846-3000. Eugene Renna, pres-Mobil Mktg/Refining worldwide; Robert O. Swanson, exec vp-intl, mktg/refining, Mobil U.S.-Mktg & Refining; Robert J. McCool, exec vp-domestic mktg/refining, Mobil U.S. Mktg/Refining; James T. Mann, vp-U.S. Mktg/Refining; Stephen D. Pryor, mktg mgr.

Mobil auto gasoline, Mobil 1 oil: DDB Needham Worldwide, New York. Lawrence Iannuzzelli, exec vp.

MOBIL CHEMICAL CO.: 3225 Gallows Road/Fairfax, Va. 22037-0001/Phone: (703) 846-3000.

Philip W. Matos, pres; Robert L. Cauffman, vp-sales and mktg, consumer prods, plastics div; Joseph J. Capalbo, vp-mktg dir, Tucker Housewares.

Hefty Bags, Baggies, Kordite: Wells, Rich, Greene BDDP, New York, Dick Byrne, exec vp.

Give your product away —on television game-shows.

It's the ultimate in low cost mass exposure. We provide a complete service to all TV game-shows. Write for details.

Game-Show Placements, Ltd.
7011 Willoughby Avenue
Hollywood, CA 90038
(213) 874-7818

RANK: 100

Monsanto Co.

St. Louis
Ad spending: **$100.8** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	15,891	11,379	39.7
Sunday magazine	489	236	107.7
Newspaper	812	1,226	-33.7
Outdoor	12	28	-57.7
Network TV	32,135	36,281	-11.4
Spot TV	8,288	14,361	-42.3
Syndicated TV	3,105	2,974	4.4
Cable TV networks	1,871	2,588	-27.7
Network radio	0	3,360	NA
Spot radio	883	717	23.1
Measured media	63,485	73,150	-13.2
Unmeasured	37,300	41,700	-10.6
Total	100,785	114,850	-12.2
By top brands	**1991**	**1990**	**% chg**
NutraSweet sweetener	26,091	23,008	13.4
Monsanto carpet	11,235	13,524	-16.9
Equal sweetener	10,125	12,076	-16.2
Roundup herbicides	8,076	4,836	67.0

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	8,864	8,995	-1.5
Earnings	296	546	-45.8
U.S.	**1991**	**1990**	**% chg**
Sales	5,636	5,685	-0.9
Operating income	459	639	-28.2
Division sales	**1991**	**1990**	**% chg**
Agricultural products	1,711	1,676	2.1
Chemicals	3,740	4,035	-7.3
Fisher Controls	928	927	0.1
NutraSweet	954	933	2.3
Pharmaceuticals	1,531	1,424	7.5

CORPORATE PROFILE

With the U.S. patent for NutraSweet expiring at yearend, parent Monsanto Co. believes future success for the sugar substitute will come from global expansion and new products.

A big relief to Monsanto were the separate, long-term agreements reached with Pepsi-Cola Co. and Coca-Cola Co. to use NutraSweet in production worldwide. The two soft-drink giants had been rumored searching for another supplier.

Advertising is to break this month on NutraSweet Spoonful, a granulated tabletop sweetener, approved earlier this year by the FDA.

Simplesse fat substitute and Simple Pleasure frozen desserts pulled $8.6 million in media, up 138% over the introductory year, according to LNA/Arbitron Multi-Media Service.

HEADQUARTERS

Monsanto Co./800 N. Lindbergh Blvd./St. Louis, Mo. 63167/Phone: (314) 694-1000.

PERSONNEL, BRANDS, AGENCIES

MONSANTO AGRICULTURAL GROUP: 800 N. Lindbergh Blvd./St. Louis, Mo. 63167/Phone: (314) 694-1000. Robert B. Shapiro, pres; Jan Novak, vp-residential prods div; Jerry Neff, dir-U.S. Roundup div; James I. Brezovec, dir-mktg, crop protection prods.

Crop protection products, Roundup: BTB Communications, St. Louis. Joe Osborn, pres.

Residential products: Glennon Cos., St. Louis. Tom Graves, vp.

MONSANTO CHEMICAL GROUP: 800 N. Lindbergh Blvd./St. Louis, Mo. 63167/ Phone: (314) 694-1000. Robert G. Potter, pres; David L. Sliney, vp-mktg; Joan Cornwall, dir-mktg comms.

NUTRASWEET CO.: 1751 Lake Cook Road/Deerfield, Ill. 60015/Phone: (708) 940-9800. Robert E. Flynn, chmn-ceo; Lauren S. Williams, pres-coo; John Lewis, vp-sales/mktg.

Equal: Ogilvy & Mather, Chicago. Myron Lyskanycz, super-grp acct dir.

NutraSweet: Chiat/Day/Mojo, Venice, Calif. Bob Grossman, vp-mgmt super.

Simplesse: FCB/Leber Katz Partners, New York. Elizabeth Green, vp-mg dir.

G.D. SEARLE & CO.: 5200 Old Orchard Road/Skokie, Ill. 60077/Phone: (708) 982-7000. Sheldon G. Gilgore, chmn-ceo; Richard U. De Schutter, pres; Joseph Curti, pres-N. Amer operations; Chuck Fry, vp-corp/public affairs.

William Douglas McAdams, New York. Eugene Fine, super.

RANK: 83

Montgomery Ward & Co.

Chicago
Ad spending: **$126.7** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	18	540	-96.6
Sunday magazine	8	66	-87.4
Newspaper	44,089	82,101	-46.3
Outdoor	4	41	-89.3
Spot TV	13,970	17,089	-18.2
Spot radio	5,544	3,393	63.4
Measured media	63,634	103,210	-38.3
Unmeasured	63,100	102,400	-38.4
Total	126,734	205,610	-38.4
By top brands	**1991**	**1990**	**% chg**
Montgomery Ward household	24,949	41,251	-39.5
Montgomery Ward misc. merchandise	18,241	34,903	-47.7
Montgomery Ward apparel	8,578	13,063	-34.3
Montgomery Ward automotive	5,753	7,523	-23.5

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	5,600	5,500	1.8
Earnings	NA	153	NA

CORPORATE PROFILE

Montgomery Ward & Co.'s middle name may be deja vu now that it's back in the catalog business.

Founded in Chicago as 'the first general-merchandise, mail-order catalog in 1872, Montgomery Ward has a long history in the mail-order business. But after losing $75 million a year on its $1.2 billion catalog operation, it canned the division in 1985—only to order it back this March. In the new venture, Ward's is teaming with Fingerhut Cos.

Ward's will abandon the "big book" idea to produce five to eight specialty books, narrowly focused on apparel, jewelry, cosmetics and other merchandise, under the name Montgomery Ward Direct. Calling this its test year, Ward's plans to send the catalogs initially to 10% of its 10 million credit cardholders.

Reflecting a "price and item" trend among retailers, Ward's has scaled back its traditional image campaign. Media advertising fell a dramatic 38.9% to $63.6 million last year. Spending in spot TV fell 18.3%, hardly a boon to D'Arcy Masius Benton & Bowles, Chicago, which won the broadcast account last year.

HEADQUARTERS

Montgomery Ward & Co./619 W. Chicago Ave./ Chicago, Ill. 60671/Phone: (312) 467-2000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: William J. McCarthy, pres-mktg; Gene McCaffery, exec vp-mktg; Rex Rambo, vp-adv & sales promo; Ron Nugent, dir-promo planning/adv admin; Bill Motsinger, dir-merch mktg.

Montgomery Ward: Saffer Advertising, Chicago. David Cravit, grp acct dir.

RANK: 14

Nestle SA

Vevey, Switzerland
Ad spending: **$600.5** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	77,067	69,375	11.1
Sunday magazine	5,388	4,633	16.3
Newspaper	3,200	4,482	-28.6
Outdoor	376	942	-60.1
Network TV	108,991	145,997	-25.3
Spot TV	63,914	50,523	26.5
Syndicated TV	33,058	37,603	-12.1
Cable TV networks	10,365	8,498	22.0
Network radio	774	2,394	-67.7
Spot radio	4,513	2,939	53.5
Measured media	307,647	327,386	-6.0
Unmeasured	292,900	311,700	-6.0
Total	600,547	639,086	-6.0
By top brands	**1991**	**1990**	**% chg**
Stouffer frozen entrees	28,044	48,714	-42.4
L'Oreal eye make-up	21,781	5,823	274.1
Taster's Choice coffee	16,504	20,141	-18.1
Nestle candy	14,572	23,543	-38.1
L'Oreal shampoo	13,797	9,073	52.1
L'Oreal hair coloring prods	13,265	19,287	-31.2
L'Oreal hair styling prods	11,021	8,215	34.2
Lancome creams & lotions	10,885	10,946	-0.6
Fancy Feast pet foods	9,953	4,888	103.6
Butterfinger candy bar	9,927	6,492	52.9
Friskies cat food	9,764	15,138	-35.5
Nestle mixes & baking prods	9,134	8,138	12.2
Mighty Dog pet foods	8,037	3,450	132.9
Tresor perfume	7,028	0	NA
L'Oreal facial make-up	6,692	4,379	52.8
Perfect Balance coffee	6,236	1,719	262.8
Contadina entrees	6,039	6,456	-6.5
Nescafe coffees	5,968	1,126	429.8
Stouffers hotels & inns	5,430	4,663	16.4
Coffee-Mate non-dairy creamer	5,353	13,735	-61.0
Carnation Good Nature formula	5,254	1,109	373.6
Lancome eye make-up	5,226	3,867	35.2

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	36,321	36,511	-0.5
Earnings	1,777	1,789	-0.7
U.S.	**1991**	**1990**	**% chg**
Sales	8,098	7,533	7.5
Division sales	**1991**	**1990**	**% chg**
Drinks	8,573	8,605	-0.4
Cereals, milks & dietetic	7,320	7,343	-0.3
Chocolate & confectionery	5,811	5,848	-0.6
Culinary products	4,554	4,657	-2.2
Frozen foods & ice cream	3,621	3,683	-1.7
Refrigerated products	3,206	3,258	-1.6
Pet foods	1,660	1,638	1.3
Pharmaceuticals	1,160	1,080	7.4
Hotels & restaurants	191	190	0.8
Other products & activities	225	209	7.5

CORPORATE PROFILE

After a shuffling of ad agencies in 1990 and consolidation of U.S. operations into a new holding company under the Nestle USA banner in 1991, Nestle mostly got back to business as usual in 1992.

The only major commotion: the move this summer of Nestle Chocolate & Confection Co. to Nestle USA's California headquarters from Purchase, N.Y.

Nestle Frozen Food Co. in 1991 stepped up promotion and dropped prices on its Stouffer dinner lines, giving Stouffer the only sales gains in the slumping frozen prepared dinners and entrees category worth $4.6 billion. The Stouffer red box line had a 9.2% share and Stouffer's Lean Cuisine a 4.4% share for the year ended March 14, 1992, Nielsen Marketing Research reported.

Nestle slashed Stouffer ad spending by 41% to $28.9 million in 1991, according to LNA/Arbitron Multi-Media Service.

In its biggest product move since the 1991 consolidation of Carnation Co. and Nestle Foods Corp., the combined Nestle Food Co. next January will start the national rollout of Nestle Sweet Success diet meal replacement.

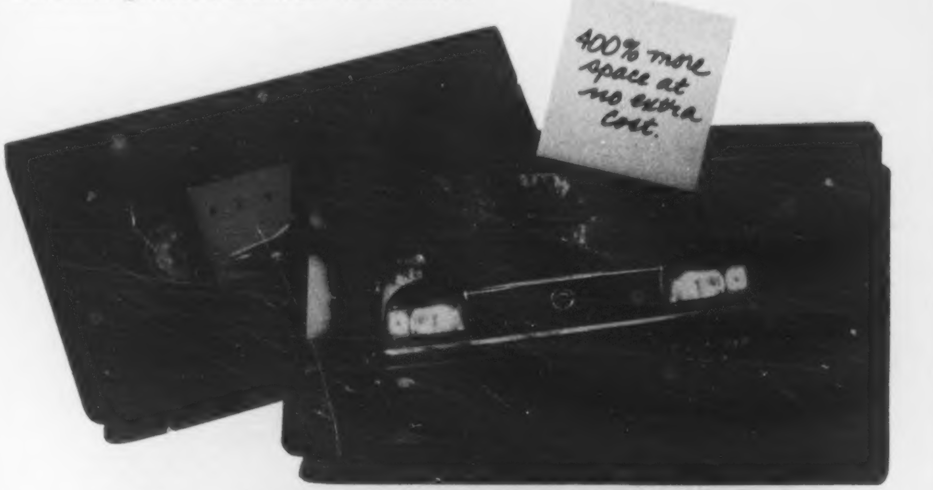
In 1991, Nestle Food put $13.4 million in advertising behind Carnation Good Start and Follow-Up infant formulas. Nestle spent only $1.1 million advertising formula in 1990. The heavy expenditure helped boost Nestle's supermarket baby-formula share in 1991 to 4.3% for the year ended May 16, 1992, from 2.4% a year earlier, according to Nielsen.

Nestle Food held its No. 2 position in pet food, with its share of the $4.7 billion supermarket category edging up to 15% for the year ended Feb. 22, 1992, from 14.8% a year earlier, Nielsen reported. Nestle increased pet food media spending 2% to $28.5 million.

Spending doubled to $10 million in 1991 on premium-price Fancy Feast cat food, which displaced Friskies cat food as Nestle's most-advertised pet food brand. Friskies' spending dipped 4.5% to $9 million. Nestle increased spending on its top dog food, Mighty Dog, by 133% in 1991 to $8 million.

Cosmair, 63% owned by Nestle SA and managed by France's L'Oreal, spent $119.1 million on measured media in 1991, less than a 1% increase. Spending on the mainstay L'Oreal line increased by 4.1% to $76.1 million, LNA noted.

Nestle early this year won a hard-fought takeover battle for Source Perrier, the global marketer of sparkling and still waters.



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HEADQUARTERS

Nestle SA/Avenue Nestle /CH-1800 Vevey, Switzerland.

PERSONNEL, BRANDS, AGENCIES

NESTLE USA: 800 N. Brand Blvd./Glendale, Calif. 91203/Phone: (818) 549-6000. John McMennamin, vp-mktg svcs; Anne Fox, corp media dir.

Nestle USA-media buying: Comcord Group (McCann-Erickson Worldwide), New York. George T. Hayes, dir.

NESTLE BEVERAGE CO.: 345 Spear St./San Francisco, Calif. 94105/Phone: (415) 546-4600. Barry Reis, sr vp-mktg.

Nescafe coffee, Taster's Choice coffee, Nestea, Coffee-mate: McCann-Erickson, New York. Michael Mainthow, vp-acct dir.

Nestle Quik: McCann-Erickson, San Francisco. Claire Roundal, sr vp-mgmt super.

Hills Bros. coffee, Chase & Sanborn coffee, Carnation Hot Cocoa: Cohen/Johnson, Los Angeles. Mark Johnson, pres. Hawk Media, San Francisco. Scott Cowan, media super.

MJB coffee: Hal Riney & Partners, San Francisco. Andrea Alfano, vp-mgmt super.

Juicy Juice, Kern, Libby's juices: Bloom FCA, Dallas. Laura Black, acct super.

Hispanic adv: coffee, Coffee-mate: La Agencia de Orci & Asociados, Los Angeles. Roberto Orci, sr vp-acct mgmt rep.

NESTLE FOOD CO.: 800 N. Brand Blvd./Glendale, Calif. 91203/Phone: (818) 549-6000. John McMennamin, vp-mktg svcs.

Carnation Instant Breakfast, Contadina canned products, Friskies cat food, Come 'N Get It dog food, Grand Gourmet dog food, Mighty Dog dog food, Superior Brands pet treats, Libby's Dinner entrees, Libby pumpkin, Libby canned meats, Carnation evaporated milk: Dailey & Associates, Los Angeles. John Stranger, sr vp-mgmt super.

Fancy Feast cat food, Carnation Follow-Up & Good Start infant formulas, Contadina pasta, sauce & pizza, Nestle Sweet Success powdered diet drinks: McCann-Erickson, Los Angeles. Diane Kuyoomjian, vp-acct dir/nutritional prods; Colin Schleining, vp-acct dir/Contadina; Arlene Spector, vp-acct dir/pet foods.

Carnation infant formulas-direct marketing: McCann Direct, New York. Keith Weld, vp-mgmt super.

Carnation infant formulas-professional adv: M.E.D. Communications, Woodbridge, N.J. Randi Kessler, acct super.

Carnation infant formulas-Hispanic adv: La Agencia de Orci & Asociados, Los Angeles. Roberto Orci, sr vp-acct mgmt rep.

Nestle Crunch, Goobers, Raisinets, 100 Grand Bar, Baby Ruth, Butterfinger: Jordan, McGrath, Case & Taylor/West, Glendale, Calif. Kristin Bloomquist, vp-mgmt super.

O'Henry, Chunky, Nestle Bars, Alpine White, After Eight, Turtles, Tollhouse, Nestle Morsels: J. Walter Thompson USA, New York and Los Angeles. Bill Gross, sr vp-mgmt dir; Kim Macalister, exec vp-mgng dir.

SweeTARTS: Glennon & Co., St. Louis. Lora Reardon, acct exec.

NESTLE FROZEN FOOD CO.: 30003 Bainbridge Road/Solon, Ohio 44139/Phone: (216) 349-5757. Jerry DeCroce, vp-mktg svcs.

STOUFFER FOODS CORP.: 30003 Bainbridge Road, Solon, Ohio 44139/Phone: (216) 349-5757. Jerry DeCroce, vp-mktg svcs.

Lean Cuisine: Tatham/RSCG, Chicago. Tom Schafer, sr partner.

Stouffer: Della Femina, McNamee, Pittsburgh. Richard Grinberg, sr vp-mgmt super.

NESTLE DAIRY SYSTEMS: 1740 Joyce Road, Columbus, Ohio 43219/Phone: (614) 294-4931. David Kewer, sr vp-mktg & sales; Jim Fortier, vp-mktg.

Baxley's ice milk, Carnation ice cream, Drumstick sundae cones, Flintstones push-ups: Fahlgren Martin, Dublin, Ohio. Lisa Hamilton, vp-acct dir.

Bon Bons ice cream nuggets; Crunch, Butterfinger ice cream novelties: Jordan, McGrath, Case & Taylor, New York. Stephen Badenhop, exec vp.

STOUFFER HOTELS & RESORTS: 29800 Bainbridge Road/Solon, Ohio 44139/Phone: (216) 248-3600. Tom O'Toole, sr dir-adv.

Stouffer hotels, resorts: Wyse Advertising, Cleveland. Peter Winzig, vp-acct grp super.

STOUFFER RESTAURANTS CO.: 30050 Chagrin Blvd./Pepper Pike, Ohio 44124/Phone: (216) 464-6606. Peggy Anderson, mktg mgr.

Stouffer restaurants: Wyse Advertising, Cleveland. Denise Albertino, acct exec.

WINE WORLD ESTATES: 2000 Main St./P.O. Box 111/Saint Helana, Calif. 94574/Phone: (707) 963-7115. Jim Tonjum, sr vp-sales & mktg; Janelle Thompson, vp-mktg.

Beringer, C&B Vintage Cellars, Chateau Souverain, Maison Deutz, Meridian, Napa Ridge: Fran Hulse Advertising, San Francisco. Fran Hulse, pres.

COSMAIR INC.: 575 Fifth Ave./New York, N.Y. 10017/Phone: (212) 818-1500. Guy Peyrelongue, pres-ceo.

Colorvive Technicare, Permavive Technicare, Preference, Studio Line haircare products; Brakkar Hair, Vanderbilt fragrances; L'Oreal cosmetics: McCann-Erickson Worldwide, New York. Janice Spector, sr vp-grp acct dir.

Armani, Lancome, Plenitude, Biotherm: Publicis, New York. Frederick Rhines, pres-ceo.

Ralph Lauren fragrances: Carlson & Partners. Sandra Carlson, pres.

RANK: 72

News Corp.

Sydney

Ad spending: **$135.8** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	17,017	13,820	23.1
Sunday magazine	1,441	145	893.2
Newspaper	22,678	29,927	-24.2
Outdoor	559	600	-6.9
Network TV	37,668	24,787	52.0
Spot TV	21,326	27,540	-22.6
Syndicated TV	10,240	6,458	58.5
Cable TV networks	3,786	3,304	14.6
Network radio	1,879	1,449	29.7
Spot radio	13,259	14,291	-7.2
Measured media	129,850	122,323	6.2
Unmeasured	5,900	5,600	5.4
Total	135,750	127,923	6.1
By top brands	**1991**	**1990**	**% chg**
20th Century-Fox movies	83,333	78,878	5.6
Fox TV network	28,352	24,919	13.8
TV Guide magazine	8,822	4,227	108.7

SALES & EARNINGS ($ in millions)

Worldwide	1992	1991	% chg
Sales	7,810	8,587	-9.0
Earnings	385	(308)	NA
Division sales	**1992**	**1991**	**% chg**
Newspapers	2,265	2,421	-6.4
Magazines/inserts	1,260	1,595	-21.0
Television	947	1,044	-9.3
Filmed entertainment	1,858	1,724	7.8
Commercial printing	1,114	1,219	-8.6
Other	367	598	-38.6

CORPORATE PROFILE

News Corp. Chairman Rupert Murdoch rolled up his sleeves following Barry Diller's resignation last March as chairman-ceo of the Fox Inc. subsidiary and took control himself, turning his gaze on the TV stations and network while giving studio chief Joe Roth freer reign than he had enjoyed under Mr. Diller.

Fox Broadcasting has continued to gain momentum and maintain its position as the most innovative of the four networks. It was the only network last year to see an increase in prime-time ad revenues, up 15% to $606.7 million. Fox wrote an estimated $500 million in business during the recently completed upfront sales period for the new season, up 43% from $350 million in 1991.

News Corp. spent $28.4 million in media advertising to promote the network last year, according to LNA/Arbitron Multi-Media Service. But the company's biggest ad spender is 20th Century Fox, which hiked media 6.3% to $83.3 million to promote 22 films, LNA noted.

The studio finished 1991 in a three-way tie for fourth place, with an 11% share of North American theatrical film rentals, down from third place and 13% a year earlier, according to *Variety*. For the first half of 1992, Fox ranked fifth with a 13.1% market share.

Mr. Murdoch's sale in June 1991 of nine consumer publications reduced his U.S. magazine holdings to *TV Guide* and *Mirabella*. *TV Guide* spent $7.7 million on subscription promotion, up 83% from 1990, as *TV Guide* sought to combat continued declines in single-copy sales. The weekly reduced its rate base 7.9% to 14 million earlier this year.

TV Guide launched a $20 million campaign last November, followed by a second stage this fall. The first tier focused on TV listings; the second, on the magazine's entertainment strengths.

HEADQUARTERS

News Corp./Two Holt St./Sydney, Australia N.S.W. 2010.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Rupert Murdoch, ceo/chmn-News Corp. Ltd., chmn, Fox Inc.; Leslie Hinton, pres/ceo-News America Publishing; Chase Carey, acting pres-Fox TV Stations; Jamie Kellner, pres-coo, Fox Broadcasting Co.; George Craig, pres/ceo-HarperCollins Publishers; Larry Jones, pres-Fox Basic Cable.

NEWS AMERICA PUBLISHING: 1211 Avenue of the Americas/New York, N.Y. 10036/Phone: (212) 852-7000. Les Hinton, pres.

Chiat/Day/Mojo, Venice, Calif.

FOX BROADCASTING CO.: 10201 W. Pico Blvd./Los Angeles, Calif. 90035/P.O. Box 900/Beverly Hills, Calif. 90213/Phone: (310) 277-2211. Jamie Kellner, pres-coo.

In-house. Pam Satterfield, sr vp-media and affiliate promo.

TWENTIETH CENTURY FOX FILM CORP.: 10201 W. Pico Blvd./Los Angeles, Calif. 90035/P.O. Box 900/Beverly Hills, Calif. 90213/Phone: (310) 277-2211. Joe Roth, chmn.

Young & Rubicam, New York/Los Angeles. Nancy Smith, exec vp.

RANK: 45

Nike Inc.

Beaverton, Ore.

Ad spending: **$223.3** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	31,447	24,887	26.4
Sunday magazine	187	133	40.6
Newspaper	343	290	18.5
Outdoor	134	234	-42.7
Network TV	53,044	42,769	24.0
Spot TV	7,728	5,995	28.9
Syndicated TV	11,931	7,656	55.8
Cable TV networks	4,698	5,735	-18.1
Spot radio	36	1	NA
Measured media	109,549	87,700	24.9
Unmeasured	113,800	91,100	24.9
Total	223,349	178,800	24.9
By top brands	**1991**	**1990**	**% chg**
Nike sporting footwear	89,419	69,300	29.0
Nike sportswear	9,335	8,209	13.7
Side 1 sporting footwear	5,019	1,437	249.1

SALES & EARNINGS ($ in millions)

Worldwide	1992	1991	% chg
Sales	3,405	3,004	13.4
Earnings	329	287	14.7
U.S.	**1992**	**1991**	**% chg**
Sales	2,271	2,142	6.0
Operating income	357	325	9.6
Division sales	**1992**	**1991**	**% chg**
U.S. athletic footwear	1,748	1,676	4.2
U.S. athletic apparel	361	325	11.0
International footwear	868	652	33.2
International apparel	267	211	26.7
Other brands	162	139	16.2

CORPORATE PROFILE

The market battle between Nike and Reebok International is escalating as growth in the $5.8 billion U.S. branded athletic shoe business slows to a crawl.

The industry grew only 4.2% in 1991, after soaring 20% to 25% annually in the mid-1980s.

To hold on to its 7-point share lead over Reebok, Nike boosted media spending 24.9% last year. Nike claimed 29.8% of the market in 1991 to Reebok's 22.8% as both gained 1 to 2 share points during the year, largely at the expense of L.A. Gear.

Nike is also struggling to hold on to its lead in the worldwide market. The company executed the industry's first global introduction in 1991 and this year used its U.S. "Instant Karma" TV spot in Europe. It hopes to be a $6 billion company with half its sales coming from Europe by 1996.

In its quest to woo young women, with whom Reebok is popular, Nike's Side 1 brand this summer began its third run in as many years at the segment. The company launched a redesigned line of

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-The Wall Street Journal, July 18, 1991

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shoes and apparel, a new logo and a a print campaign with the theme "When women move."

Nike boosted spending for its Nike brand women's print campaign by 29.5% to $9.3 million in 1991, according to LNA/Arbitron Multi-Media Service, and is expected to hike spending even more significantly in fiscal 1993, which began June 1. The added dollars will cover a major women's TV campaign early next year.

HEADQUARTERS

Nike/1 Bowerman Drive/Beaverton, Ore. 97005/Phone: (503) 671-6453.

Side 1/513 N.W. 13th Ave./Portland, Ore. 97209/Phone: (503) 224-1450.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Tom Clarke, gm-Nike brand; Andy Mooney, vp-dir, mktg; Stephen Gomez, vp-dir, apparel mktg; Scott Bedbury, dir-adv; Mike Wilskey, dir-intl mktg.

SPORT CASUALS DIV: Ron Nelson, vp-sport casuals; Deb Johnsen, gm-Side 1; Nancy Monsarrat, dir-adv, sport casuals.

Nike, Side 1: Wieden & Kennedy, Portland, Ore. John Russell, mgmt super.

Broadcast media buying: Nike, Side 1: SFM Media, New York. Bill Barrett, sr vp-dir, client svcs.

Ethnic mktg: Nike, Side 1: Muse Cordero Chen, Los Angeles. Greg Hogan, vp-client svcs.

i.e.: Cole & Weber, Seattle. Jon Dietrich, acct mgr.

COLE-HAAN: 44 N. Elm St./Yarmouth, Maine 04096/Phone: (207) 846-3721. Karen Haskell, vp-mktg comms

Cole-Haan: Margeotes Fertitta & Weiss, New York. Dale Seiffer, acct super.

RANK: 37

Nissan Motor Co.

Tokyo

Ad spending: **$268.9** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	30,033	50,150	-40.1
Sunday magazine	575	1,066	-46.0
Newspaper	10,817	12,368	-12.5
Outdoor	1,417	1,808	-21.6
Network TV	66,434	125,792	-47.2
Spot TV	85,249	108,189	-21.2
Syndicated TV	12,352	17,237	-28.3
Cable TV networks	2,569	4,821	-46.7
Spot radio	2,561	2,017	27.0
Measured media	212,006	323,448	-34.5
Unmeasured	56,900	86,800	-34.4
Total	268,906	410,248	-34.5
By top brands	**1991**	**1990**	**% chg**
Nissan cars	137,140	197,664	-30.6
Infiniti cars	47,698	86,038	-44.6
Nissan trucks & vans	26,797	38,246	-29.9

SALES & EARNINGS ($ in millions)

Worldwide	1992	1991	% chg
Sales	48,263	42,300	14.1
Earnings	762	340	124.0

CORPORATE PROFILE

Tiring of a gradual seven-year decline in sales, Nissan Motor Corp. USA is putting full weight behind this fall's launch of the Altima compact sedan, a potential high-volume seller.

Nissan will funnel $120 million in marketing support behind the 1993 model launch of Altima. The support will also mark a return to magazines for Nissan, which pared magazine advertising in 1991 by 40%. An estimated $35 million to $40 million will be spent in the medium as part of the launch.

The Altima needs to invigorate Nissan's profit picture. The company, which originally forecast a 2% slip in unit car sales for the year ending March 31, 1993, reported last month it expects sales to drop 8.9%. In the first half ending Sept. 30, 1992, Nissan now projects a pretax loss of 15 billion yen vs. an earlier prediction of a gain of 10 billion yen. Nissan earned 41.5 billion yen in the first half of last year.

During calendar 1991, unit sales dropped 6.2% to 548,926 for Nissan and Infiniti combined. However, its combined share of the U.S. car and light-truck market rose to 7.1% from 6.7%. Nissan ranks third among Japanese marketers.

In the luxury segment, Nissan's Infiniti division sold 34,890 units, up 45.6%, but it's still in third place behind American Honda Motor Co.'s Acura at 143,708 units, up 3.8%, and Toyota's Lexus at 71,206, up 12.1%.

Another new entry: Quest, a minivan produced by Ford Motor Co. but marketed by Nissan. The company expects to sell 35,000 of the minivans through August 1993 and 50,000 a year thereafter.

Sales of Nissan's best-selling Sentra, an entry-level subcompact, accounted for 146,618 units (both domestic and imports), down 7.8%. The Sentra had the support of an estimated $32.8 million in media for 1991, down 27.1%, according to LNA/Arbitron Multi-Media Service. The top-of-the-line Maxima, which sold 99,026 units, was backed by $30 million in media advertising, up 51%, LNA aid.

Measured media spending by Nissan for most other nameplates was down. Media advertising for Infiniti accounted for $47.6 million, down 44.6%.

HEADQUARTERS

Nissan Motor Corp. USA/18501 S. Figueroa St./Carson, Calif. 90248/P.O. Box 191/Gardena, Calif. 90247/Phone: (310) 532-3111.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Haruo Ohno, pres-Nissan N. Amer.; Tom D. Mignanelli, pres-Nissan Motor Corp. USA; Robert J. Thomas, vp-corp strategy/resource devel.

NISSAN DIV: 18501 S. Figueroa St./Carson, Calif. 90248/P.O. Box 191/ Gardena, Calif. 90247-6783/Phone: (310) 719-2100. Earl Hesterberg, vp-gm; Jules Clavadetscher, genl mktg mgr; Ruth Emir, adv mgr creative; Karen Gustafson, adv media mgr; William Bivens, truck/utility vehicles mgr.

Chiat/Day/Mojo, Venice, Calif. Tom Patty, exec vp-acct dir.

INFINITI DIV: 18701 S. Figueroa St./Carson, Calif. 90248/P.O. Box 47038/Gardena, Calif. 90247-6838/Phone: (310) 719-5999. William Bruce, vp-gm; Robert Paske, genl mktg mgr; Brad Bradshaw, adv mgr; John Hibbard, merch mgr; John Nystrom, regional mktg mgr.

Hill, Holliday, Connors, Cosmopulos, Marina del Rey, Calif. Gene Cameron, pres/Los Angeles.

RANK: 60

Paramount Communications

New York

Ad spending: **$179.4** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	4,599	4,615	-0.3
Sunday magazine	1,876	63	NA
Newspaper	22,334	26,118	-14.5
Outdoor	1,016	1,544	-34.2
Network TV	24,208	23,838	1.6
Spot TV	31,618	24,872	27.1
Syndicated TV	11,011	8,380	31.4
Cable TV networks	4,557	3,855	18.2
Network radio	194	703	-72.4
Spot radio	7,102	3,351	111.9
Measured media	108,515	97,339	11.5
Unmeasured	70,900	63,600	11.5
Total	179,415	160,939	11.5
By top brands	**1991**	**1990**	**% chg**
Paramount pictures	94,048	84,287	11.6
Paramount home video cassette	5,244	3,938	33.2

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	3,895	3,869	0.7
Earnings	122	259	-52.8
Division sales	**1991**	**1990**	**% chg**
Entertainment	2,380	2,447	-2.7
Publishing	1,515	2,072	-26.9

CORPORATE PROFILE

Paramount Communications regained its acquisition appetite in 1992, after slimming down in the '80s by selling off its non-entertainment properties.

Paramount will pay $400 million to acquire Kings Entertainment Co., owner of regional amusement parks. The move pits it once again against Walt Disney Co., Universal Studios and Warner Bros., all of which have their own theme parks, and will allow Paramount to finally leverage the characters and settings from "Indiana Jones," "Wayne's World" and "Star Trek" among others.

Despite a poor showing in fiscal 1991, ended Oct. 31, Paramount is cash rich and additional acquisitions are expected.

Paramount Pictures Corp.'s feature films still represent the largest revenue segment for the company. But despite an increase in the number of films released in 1991, to 21 from 17 in the previous year, Paramount's share of the box office last year declined to 12%, down from 14.9% in '90, according to *Daily Variety*. Measured spending for feature films increased 12% to $96.2 million, according to LNA/Arbitron Multi-Media Service.

The studio's rank in 1991 dropped from No. 2 to No. 3, behind Warner Bros. and Disney's Buena Vista.

For the first six months of 1992, Paramount sank to fourth, despite increasing its share of the box office to 13.4%.

Activity in home video, an area in which Paramount has brought substantial innovation, has been relatively quiet for the company, though its recent release of megahit "Wayne's World" should do well. Measured spending in home video increased 33% to $5.2 million, LNA noted.

HEADQUARTERS

Paramount Communications/15 Columbus Circle/New York, N.Y. 10023/Phone: (212) 373-8000.

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PERSONNEL, BRANDS, AGENCIES

CORPORATE: Jerry Sherman, sr vp-corp comms.
PARAMOUNT PICTURES CORP.: 5555 Melrose Ave./Los Angeles, Calif. 90038/Phone: (213) 956-5000. Harry Anderson, vp-comms.
MOTION PICTURE GRP.: 5555 Melrose Ave./Los Angeles, Calif. 90038/Phone: (213) 956-5000. Arthur Cohen, pres-worldwide mktg; Nancy Goliger, exec vp-mktg/creative affairs; Michael Camp, exec vp-creative adv; Bryan Allen, sr vp-creative adv; Thomas Campanella, exec vp-natl adv/promo; Jerry A. Meadors, vp-mktg svcs; Leslie Pound, sr vp-intl mktg; Susan Wrenn, vp-natl adv.

Ogilvy & Mather, Los Angeles. Ernie Shapiro, vp-acct super.

Home video: Hollace Brown, sr vp-adv/sales promo; Alan Perper, sr vp-mktg.

Ogilvy & Mather, Los Angeles. Ernie Shapiro, vp-acct super. Ron Reilly, sr vp-exec media dir.
TELEVISION GRP.: 5555 Melrose Ave./Los Angeles, Calif. 90038/Phone: (213) 956-5000. Meryl Cohen, exec vp-adv/promo, Domestic TV; John Wentworth, vp-adv/promo/publicity, Network TV.

Domestic TV: Jacobs & Gerber, Los Angeles. Albert Litewka, ceo.

Network TV: Grey Advertising, New York. Gerry Logue, acct dir.
MADISON SQUARE GARDEN: Two Pennsylvania Plaza/New York, N.Y. 10001/Phone: (212) 465-6000. Monie Begley, sr vp-pr; Lee Burke, vp-mktg.

Madison Square Garden Network: Burkhardt & Christy Advertising, New York. Don Kurn, sr vp-mgmt super.
SIMON & SCHUSTER: 1230 Avenue of the Americas/New York, N.Y. 10020/Phone (212) 698-7000. Joseph W. Bereswill, vp-comms.

Baron & Zaretsky Advertising, New York. Ken Baron, exec dir; Burt Zaretsky, vp.

Simon & Schuster Trade Div: Franklin Spier, New York. Erin McHugh, vp.

Pocket Books Div, Prentice Hall General Reference: Franklin Spier, New York. Rhonda Hall, vp-acct exec.

Silver Burdett Ginn: The Sterling Agency, Morristown, N.J. Maureen Doyle, acct exec.

Prentice Hall Legal & Financial Services: McCaffrey & McCall, New York. Laurette Austin, acct exec.

Prentice Hall Professional Software: Sambrick Communications, Raleigh, N.C. Frank Sambrick, pres.

Modern Curriculum Press: Belden, Frenz & Lehman, West Lake, Ohio. Becky Rahija, acct exec. Also: Hartzel Inc., Cleveland Ohio. David Hartzel, pres.

Simon & Schuster Human Resources: Tempo Advertising, New York. Irene Goldsmith, acct exec.

RANK: 29

J.C. Penney Co.

Dallas
Ad spending: $362.6 million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	7,753	14,616	-47.0
Sunday magazine	811	1,004	-19.2
Newspaper	33,594	70,631	-52.4
Outdoor	119	75	58.8
Network TV	38,679	41,427	-6.6
Spot TV	8,513	9,676	-12.0
Syndicated TV	3,373	2,434	38.6
Cable TV networks	441	1,090	-59.5
Network radio	7,131	6,747	5.7
Spot radio	4,741	5,898	-19.6
Measured media	105,156	153,596	-31.5
Unmeasured	257,400	240,300	7.1
Total	362,556	393,896	-8.0
By top brands	**1991**	**1990**	**% chg**
Penney's apparel	43,720	62,290	-29.8
Penney's misc. mdse.	29,863	48,120	-37.9
Penney's household products	12,462	15,952	-21.9
Penney's jewelry	7,109	11,661	-39.0
Penney's drugs & toiletries	5,584	2,814	98.5

SALES & EARNINGS ($ in millions)

Worldwide	1992	1991	% chg
Sales	17,295	17,410	-0.7
Earnings	80	577	-86.1
Division sales	**1992**	**1991**	**% chg**
J.C. Penney stores	14,277	14,616	-2.3
Catalog	3,002	3,220	-6.8
Drugstores	1,282	1,196	7.2

CORPORATE PROFILE

J.C. Penney Co., after refining its merchandising mix and ad message, has seen a dramatic improvement in sales.

Penney's stores reported a 12.1% increase in sales (11.3% on a same-store basis) to $5.6 million for the six months of fiscal 1993 ended July 25.

Sales in the year-earlier period had been down 0.3%. Catalog sales for the current half rose 0.9% to $1.3 billion. Last year, they were down 6.8%.

Penney's, in a step back to its value roots, has filled its racks with more moderately priced fashion merchandise. In recent years, it's downplayed value to distance itself from the Sears/Montgomery Ward clone it once was.

To deal with hard times, the retailer pared its ad budget in 1991. Media dropped 31.5% for calendar 1991, according to LNA/Arbitron Multi-Media Service, as part of Penney's marketing budget that dropped 4.3% to $398 million.

Penney's was the official retail sponsor of the 1992 U.S. Olympic Team and the exclusive retailer of licensed USA Olympic brand apparel and footwear.

HEADQUARTERS

J.C. Penney Co./14841 N. Dallas Parkway/Dallas, Texas 75240-6760/Phone: (214) 591-1000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: James E. Oesterreicher, pres.

J.C. Penney stores and catalog: W. Barger Tygart, sr exec vp-dir merch; Jerry M. Goad, vp-mktg comms; Dean Erickson, sales plans mgr; Edward Hayward, adv mgr; K.L. Baker, dir-merch/publicity/special events; Dave Nafziger, dir-visual merch; Robert Burke, controller-merch; James L. Hailey, pres-women's div; Marshall Beere, Marilee Cumming, Gerry Shores, vps-dirs mktg/merch, women's div; J. Raymond Pierce, pres-men's div; Randy Ronning, Dave Fulcomer, vps-dirs merch, men's div; Henry H. Scott, pres-children's div; Andrew Cumming, Tice Segal, vps-dir merch children's div; James J. Kennedy, pres-home & leisure div; J. Thomas Arthur, vp-dir mktg home & leisure div.

J.C. Penney Stores & products: Temerlin McClain, Irving, Texas. Dennis Visich, dir-client svcs.

THRIFT DRUG INC.: 615 Alpha Drive/Pittsburgh, Pa. 15238/Phone: (412) 963-6600. Trish Orchard, mgr mktg svcs; John Leibrick, ad mgr; Sandy Woncheck, promo mgr.

Thrift/Treasury drugstores: Ketchum Advertising, Pittsburgh. Lynn Frohm, vp-acct super.

RANK: 5

PepsiCo

Purchase, N.Y.
Ad spending: $903.4 million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	7,833	9,046	-13.4
Sunday magazine	137	82	66.3
Newspaper	2,315	4,923	-53.0
Outdoor	2,893	4,893	-40.9
Network TV	204,572	193,447	5.8
Spot TV	261,404	284,602	-8.2
Syndicated TV	29,013	18,001	61.2
Cable TV networks	15,116	13,119	15.2
Network radio	3,557	2,682	32.6
Spot radio	15,201	16,440	-7.5
Measured media	542,040	547,237	-0.9
Unmeasured	361,400	307,800	17.4
Total	903,440	855,037	5.7
By top brands	**1991**	**1990**	**% chg**
Kentucky Fried Chicken restaurant	119,873	118,433	1.2
Pizza Hut restaurants	118,435	107,001	10.7
Taco Bell restaurants	92,668	81,229	14.1
Pepsi beverages	70,261	79,420	-11.5
Diet Pepsi beverage	69,002	76,486	-9.8
Mountain Dew beverage	15,265	11,694	30.5
Sunchips	14,566	200	NA
Frito snacks	13,876	22,111	-37.2
Doritos snacks	13,799	24,637	-44.0

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	19,608	17,803	10.1
Earnings	1,080	1,091	-1.0
U.S.	**1991**	**1990**	**% chg**
Sales	15,168	14,047	8.0
Operating profits	1,842	1,853	-0.6
Division sales	**1991**	**1990**	**% chg**
Soft drinks	6,915	6,523	6.0
Snack foods	5,566	5,054	10.1
Restaurants	7,127	6,226	14.5

CORPORATE PROFILE

PepsiCo has begun to rebuild its profits, which turned sour in 1991 after years of impressive growth.

In first quarter 1992, profits rose 18%, restoring a bottom line crunched by cost-cutting competitors last year. Giving profits a boost was a leaner Frito-Lay unit, which in 1991 cut 1,800 from its payroll, or about 7% of the work force.

Kentucky Fried Chicken also eliminated several hundred jobs to cut overhead and give top managers more control over operations this year, mirroring similar moves by Taco Bell in 1990.

In soft drinks, Pepsi-Cola Co. changed its decade-old "Choice of a new generation" theme for "Gotta have it." The broader theme was selected to attract not only the young but the middle-aged who were the original "Pepsi generation."

In 1991, Pepsi-Cola had an 18.4% share, down from 18.8% a year earlier, just behind soft-drink leader Coca-Cola Classic, whose share was flat at 20%, according to Beverage Digest.

The "Uh-huh" campaign starring singer Ray Charles continued for Diet Pepsi. Its media spending fell 10.5% to $68 million last year. Spending on main brand Pepsi-Cola also declined, to $61 million in '91, down 19%, according to LNA/Arbitron Multi-Media Service.

In first quarter 1992, support for flagship Pepsi more than doubled to $27 million at the expense of Diet Pepsi spending, which dropped a whopping 65%, according to Manny Goldman, analyst with PaineWebber.

Pepsi-Cola Co. also continued eyeing other beverage categories. It struck a deal with Thomas J. Lipton Co. to distribute its iced teas, and also began distributing Ocean Spray juice products. It began testing Avalon, a still water, and continued tests of All Sport isotonic and H2Oh! sparkling water. Earlier this year, the company began testing Crystal Pepsi, clear soft drinks in both sugared and diet versions.

Kentucky Fried Chicken began using KFC in all store signage and advertising, a change some say was meant to avoid the word "fried." KFC launched a new ad campaign featuring the fictitious Lake Edna and rolled out new products, one of the bigger hits being its Skin-Free Chicken. KFC had a 72.4% share of the $4.7 billion chicken restaurant market last year, up from 71.5% in 1990.

Taco Bell continued its low-price strategy, introduced in 1988, by adding breakfast to its under-a-buck items. It also introduced a pricier Steak Burrito Bel Grande for $1.99. Taco Bell held 7.3% of the $37 billion sandwich market, up from 6.7% in 1990.

Pizza Hut, with a leading 43.5% share of the $9.5 billion fast pizza market, increased its emphasis on delivery with its first separate national campaign featuring Aretha Franklin singing "Deliver me." Pizza Hut is also testing a cafe concept offering a broader menu and waitress service.

Frito-Lay, the leader in the $13.4 billion salty snacks market, with a 42% share, reformulated and stepped up advertising for Ruffles potato chips and gave Lay's potato chips its first advertising in 10 years. The company put $20 million behind its Sunchips multigrain snack and this month began test-marketing Doritos Tortilla Thins.

HEADQUARTERS

PepsiCo/Anderson Hill Road/Purchase, N.Y. 10577/Phone: (914) 253-2000.

PERSONNEL, BRANDS, AGENCIES

PEPSI-COLA NORTH AMERICA: Pepsi-Cola Co./One Pepsi Way/Somers, N.Y. 10589/Phone: (914) 767-6000. Craig Weatherup, president-ceo; David Novak, exec vp-mktg/national sales; Michael Lorelli, president, Pepsi-Cola East; Brenda Barnes, president, Pepsi-Cola South; Mauricio Pagés, president, Pepsi-Cola Central; Christopher M. Hallenback, president, Pepsi-Cola West; Brian Swette, senior vp-gm, new beverage ventures; Frank Rupp, senior vp-creative services; Rick Rock, vp-media/entertainment.

Pepsi-Cola, Diet Pepsi, Slice, Mountain Dew, All Sport: BBDO Worldwide, New York. William Katz, exec vp-worldwide sr acct dir.

Mug root beer: Lois/GGK, New York. Mark Rothman, mgmt super.

African-American adv: Lockhart & Pettus, New York. David Harris, sr vp-dir client svcs.

Hispanic adv: Siboney Advertising, New York. Luis Nasr, vp-gm.

Pepsi-Cola: on-premise/field mktg & adv: Tracy-Locke, Dallas. Mike Rawlings, ceo.

FRITO-LAY: 7701 Legacy Drive/Plano, Texas 75024/Phone: (214) 334-7000. Steve Liguori, vp-brand mktg; Dwight Riskey, new prods-mkt rsch.

Fritos, Cheetos, Tostitos, Rold Gold pretzels and selected new prods: DDB Needham Worldwide, Chicago. Dawn Hudson, grp acct dir.

Doritos, Smartfood popcorn, Lay's potato chips, Ruffles potato chips, Sunchips, Sunchips multi-grain snacks and selected new prods: Andy Russon, sr vp-acct dir.

All prods/sell promo agency: Tracy-Locke, Dallas. Mike Rawlings, ceo.

PIZZA HUT: 9111 E. Douglas/Wichita, Kan. 67207/Phone: (316) 681-9000. Robert Perkins, sr vp-mktg; Terry Davenport, vp-segment mktg.

BBDO Worldwide, New York. John Berg, vp-acct dir.

TACO BELL: 17901 Von Karman/Irvine, Calif. 92714/Phone: (714) 863-4500. Tim Ryan, sr vp-mktg; Terry Davenport, vp-mktg; Naomi Pollock, dir-creative svcs.

Foote, Cone & Belding, San Francisco. Dan Odishoo, grp mgmt super.

KENTUCKY FRIED CHICKEN CORP.: 1441 Gardiner Lane/Louisville, Ky. 40213/Phone: (502) 456-8300. Colin Moore, sr vp-mktg; John Wendler, vp-mktg/operations devel, intl; Peter J. Foulds, vp-adv; Ed McPherson, vp-field mktg; Thomas A. Cross, vp-mktg svcs.

Young & Rubicam, New York. John Swan, sr vp-grp dir, domestic; Norman Kappler, sr vp-mgmt super, intl.

RANK: 2

Philip Morris Cos.

New York
Ad spending: $2045.6 million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	215,073	260,044	-17.3
Sunday magazine	12,387	15,420	-19.6
Newspaper	17,793	19,915	-10.7
Outdoor	69,679	77,140	-9.7
Network TV	389,467	402,238	-3.2
Spot TV	206,162	224,924	-8.3
Syndicated TV	135,687	133,757	1.4
Cable TV networks	24,076	26,607	-9.5
Network radio	6,570	14,481	-54.6
Spot radio	33,453	29,176	14.7
Measured media	1,110,356	1,203,700	-7.8
Unmeasured	935,200	1,013,800	-7.8
Total	2,045,556	2,217,500	-7.8
By top brands	**1991**	**1990**	**% chg**
Miller beer	233,719	181,398	28.8
Post cereals	116,944	110,998	5.4
Marlboro cigarettes	101,417	85,376	18.8
Kraft cheeses	53,951	76,696	-29.7
Maxwell House coffees	45,589	92,749	-50.8
Kraft salad drsng/mayo	44,334	56,923	-22.1
GF Intl Coffees	30,274	36,863	-17.9
Virginia Slims cigarettes	27,933	44,214	-36.8
Jell-O gelatins/pudgs	25,954	29,306	-11.6

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	56,458	51,169	10.3
Earnings	3,006	3,540	-15.1
U.S.	**1991**	**1990**	**% chg**
Sales	37,890	36,014	5.2
Operating profit	7,028	6,715	4.7
Division sales	**1991**	**1990**	**% chg**
Domestic tobacco	11,589	10,370	11.8
International tobacco	12,251	10,720	14.3
Food	28,178	26,085	8.0
Beer	4,056	3,534	14.8
Financial svcs	384	460	-16.5

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CORPORATE PROFILE

While Philip Morris Cos.' big sales generator, Kraft General Foods, just barely eclipsed year-earlier sales results in 1991, the tobacco division continued a torrid pace that included a 13% growth in worldwide sales and 15.5% advance in operating income.

Philip Morris segments, tobacco in particular, are expected to generate $21 billion in excess cash (cash left over after taxes, dividends and capital expenditures) over the next five years. The question isn't whether the company will hit the acquisition trail but when and whom it will strike.

Philip Morris has stated it's looking for dominance in food on an international level.

The continued strength in Philip Morris' tobacco division came amid a 2% decline in U.S. industry unit sales. Tobacco represented 42.1% of the company's total 1991 sales but 72% of operating profit.

Last year, Philip Morris increased its volume to 220.71-billion units, up 0.1%, giving it 43.4% of the cigarette industry's volume, up 1.1 share point, according to John C. Maxwell Jr., analyst with Wheat, First Securities.

This month, PM introduced Benson & Hedges Special Kings—an 85-millimeter version of the 100-millimeter upscale cigarette. The company declined to discuss the line extension's ad spending, though typically $40 million is the industry standard to introduce a new brand.

In 1991, Philip Morris spent $16.1 million in media on Benson & Hedges, down 31.8%, according to LNA/Arbitron Multi-Media Service. Benson & Hedges ranks No. 8 in the U.S. with a 3.2% market share. By comparison, Philip Morris' No. 1 Marlboro has almost 25% of the market.

Earlier in the year, Philip Morris brought to market what it termed a technologically advanced smoke called Merit Ultima. The company spent an estimated $30 million-plus in advertising and promotion.

Measured media backing for the Merit brand in 1991 was $10 million, according to LNA. PM executives said the heavy spending on Merit Ultima represents a partial shift in spending from regular Merit.

While overall growth in sales of Kraft General Foods rose 8%, sales of the dominant North American portion advanced only 0.5% during the year. North American sales represented 71.6% of Philip Morris' worldwide food sales of $28.2 billion.

In general, KGF returns were hurt by consumers trading down to low-price brands. The division earlier this year launched a program to bring consistently lower prices to consumers by cutting the prices it charges grocers for some products and reducing spending on promotion.

The company boosted its share in the ground roast coffee market to 33.3% from 32.7%, though in instant coffees its share declined to 35.8% from 36.3%, according to Mr. Maxwell.

Such share movement couldn't translate into greater dollar returns, however, because both segments of the market were in a decline: ground roast off 9.1% to $2.5 billion and instant down 9.9% to $1.05 billion.

The company's Maxwell House brand remained second to P&G's Folgers in the ground roast market with a 19.1% share, up 0.3 point to the latter's 31.2%. PM backed Maxwell House with $45.4 million, down more than 50% from 1990, according to LNA.

Breyers and Sealtest held a combined 16.8% of the $2.2 billion ice cream market, up 0.8%, and a combined 19% of the ice milk market valued at $460.7 million. Breyers was on top in both cases with shares of 13.2% and 12%, respectively, according to Nielsen Marketing Research.

In the highly contested ready-to-eat cereal market, KGF's Post brand rose to an 11.6% share from 11.3%, according to Nielsen. Post cereals were backed with $120 million in media spending, up 8.1%, according to LNA. The market for ready-to-eat cereals is valued at $8 billion.

Among frozen foods, Budget Gourmet's share dropped 0.6 percentage point to 10% of the dinners/entrees segment valued at $3.4 billion, to rank third behind Nestle Frozen Food Co.'s Stouffer (12.7% share) and Con-Agra's Healthy Choice (10.2%), Nielsen noted.

A combined 38.5% share of the deli-sliced luncheon meats market, valued at $2.6 billion, was grabbed by the Oscar Mayer (27.3% share) and Louis Rich (11.2%) brands, according to Nielsen. PM said processed meats suffered a decline in volume in 1991. Media spending on Oscar Mayer and Louis Rich branded products was cut by 19.1% to a collective $46.3 million.

Miller Brewing Co.'s share of the beer market increased to 22.3%, up 0.5 point, as the growth of Miller Genuine Draft and Genuine Draft Light helped it maintain volume even as the industry registered a volume decline.

Genuine Draft, the country's No. 7 brand in only its second year on the market, grew 10.2% to 6.5 million barrels in 1991. However, Miller Lite, the nation's No. 2 beer, saw volume drop 4.5%.

HEADQUARTERS

Philip Morris Cos./120 Park Ave./New York, N.Y. 10017/Phone: (212) 880-5000.

PERSONNEL, BRANDS, AGENCIES

PHILIP MORRIS USA: 120 Park Ave./New York, N.Y. 10017/Phone: (212) 880-5000. David E.R. Dangoor, sr vp-mktg; Ellen Merlo, vp-mktg svcs; David Beran, vp-mktg rsch & planning; Suzanne A. LeVan, vp-premium brands; Nancy Brennan Lund, vp-brand mgmt, Marlboro; Robert L. Mikulay, vp-brand mgmt-discount prods; Stephen K. Piskor, dir-strategic planning & budget control; Marlboro; Michael J. Mahan, dir-strategic planning & budget control, discount brands; Stephen Vasquez, brand mgr, Cambridge; Thomas M. Gargiulo, assoc brand mgr, Bucks; Julie A. Greene, assoc brand mgr, Alpine; Arthur J. Goldfarb, dir-strategic planning and budget control, premium brands; Carl L. Cohen, brand mgr, Virginia Slims; Peter G. Henriques, brand mgr, Benson & Hedges/Next; Susan L. Jannetta, brand mgr, Merit; Nancy J. Parmet, assoc brand mgr, Parliament; Ina Broeman, mgr, Virginia Slims & discount brand events; Edna Moore, mgr, Benson & Hedges & community mktg events; James Spector, dir of promo svcs; Marla Antonoff, mgr-premium brands promo svcs; Robert I. Tomei, mgr-database and fulfillment operations; Richard Stirlen, dir of media and POS devel; Phyllis Kornbluth mgr-POS devel; Roy Anise, dir-mktg rsch; Karen E. Altenberg, assoc brand mgr-new prods/Cartier.

Cartier, Bristol, Parliament, new prods: Backer Spielvogel Bates Worldwide, New York. Claudia Berk, sr vp-mgmt rep.

Alpine, Benson & Hedges, Bucks, Cambridge, Marlboro, Merit, Virginia Slims and new prods: Leo Burnett USA, Chicago. Peter Volz, exec vp.

KRAFT GENERAL FOODS NORTH AMERICA: Three Lakes Drive/Northfield, Ill. 60093-2753/Phone: (708) 998-2000. Eric Stroebel, sr vp-corp mktg. Loraine Scarpa, vp-mktg svcs, KGF; Richard Helstein, vp-adv svcs, KGF; Marjorie Kaplan, dir adv, KGF; Bill Schumacher, dir adv, KGF.

KRAFT GENERAL FOODS [illegible] ([illegible]): Seven Penn Center/1635 Market St./Philadelphia, Pa. 19103-2299/Phone: (215) 557-5100. Charles F. Marcy, pres, National Dairy Products Corp.; Timothy J. Kregor, vp-gm, cultured prods and toppings; Michael J. Bailey, vp-gm, frozen desserts; John Craig, pres, Lenders; Mariann Emswiler, vp-mktg, Lenders; Jim Dwyer, vp-mktg, Tombstone; Lawrence Benjamin, pres, All American Gourmet; Michael McGrath, vp, Main Meals.

All American Gourmet, Bird's Eye, Budget Gourmet, Breakstone, Breyers Ice Cream, [illegible], Light n' Lively, Sealtest: Young & Rubicam, New York. Susan Gianinno, worldwide acct dir.

Kraft Eating Right, Kraft Frozen Entrees, Tombstone Pizza: Foote, Cone & Belding, Chicago. Joan Black, sr vp-grp acct dir.

Cool Whip, Lender's Bagels, [illegible] Dairy Prods, Kool-Aid Kool Pops: D'Arcy Masius Benton & Bowles, New York. I. Peter Rosow, sr vp-joint mg dir.

KRAFT USA: Kraft Court/Glenview, Ill. 60025/Phone: (708) 998-2000. Mark Leckie, vp-mktg, grocery prods; Betsy Holden, vp-mktg, grocery prods; Todd Brown, dir-mktg, grocery prods; Sandy Posa, vp-mktg, retail cheese; Dave Johnson, vp-mktg, retail cheese; Cathy Jarus, dir-mktg, specialty prods.

Kraft BBQ Sauce, Bull's Eye BBQ Sauce, [illegible], Grated Parmesan, Handi-Snacks, Kraft Macaroni & Cheese, Kraft Salad Sauces, Kraft Side Dishes, Touch of Butter Spread, Velveeta Shells & Cheese: Foote, Cone & Belding, Chicago. Joan Black, sr vp-grp acct dir.

[illegible] Cheese: Grey Advertising, Los Angeles. Melissa Hochschild, vp-mgmt super.

Cheese Whiz, [illegible] Specialty Cheeses, Deluxe Slices, Kraft Singles, Miracle Whip, Philadelphia Cream Cheese, Polly-O-Cheese: J. Walter Thompson USA, Chicago. Ray Marione, sr vp-mgmt dir.

Cracker Barrel, [illegible] Pastas and Sauces, Kraft Brand Natural Cheese, Kraft Brand Salad Dressing, Kraft Free Salad Dressing, Kraft Light Naturals, Kraft Real Mayonnaise, Parkay Margarine, Seven Seas salad dressing, Spreadery, Velveeta: Leo Burnett USA, Chicago. Dan Reid, exec vp.

OSCAR MAYER FOODS: 910 Mayer Ave./Madison, Wis. 53704/P.O. Box 7188/Madison, Wis. 53707/Phone: (608) 241-3311. Rick Searer, vp-gm, Oscar Mayer; Bryan Stockton, vp-gm, Louis Rich & subsidiaries; Bob Drane, vp-new prod devel and TQM mktg svcs; Gary Rawlings, mktg mgr, Oscar Mayer; Steve Shaney, mktg mgr-Louis Rich.

Claussen pickles, Oscar Mayer meats, Lunchables: J. Walter Thompson USA, Chicago. Jerry Johnston, sr vp-dir, client svcs.

Louis Kemp Seafood: D'Arcy Masius Benton & Bowles, Chicago. Ben Bishop, sr vp-grp acct dir.

Louis Rich Meats: D'Arcy Masius Benton & Bowles, New York. Martin Grant, sr vp-grp acct dir.

GENERAL FOODS USA: 250 North St./White Plains, N.Y. 10625/Phone: (914) 335-2500. Irene Rosenfield, exec vp-gm; Steven Mintz, vp-mktg beverage div; Paula Sneed, exec vp-gm, Sally Genster Robling, dir-mktg, desserts div; Ann Fudge, exec vp; Nancy Wong, dir-mktg; Ann Dew, dir-new bus devel, dinners and enhancers; Greg Murphy, pres; Eva Page, vp-base brands, Ann Marks, mktg dir-devel, Maxwell House Div; Sylvester Hinkes, exec vp-genl mgr, Paul Singer, mktg dir; Robert Lowe, dir-new bus, Post Cereals; Peter Rollins, pres-ceo; Albert Freihofer, vp-sales & mktg, Freihofer's.

Freihofer's: Partners Meany, Albany, N.Y. Leslie Baker, vp.

[illegible], Crystal Light, Entenmann's, Good Seasons, [illegible]: D'Arcy Masius Benton & Bowles, New York. I. Peter Rosow, sr vp-joint mg dir.

Bakers, Kool-Aid Brand PSD, [illegible], Minute Rice, Post Bran Flakes, Post Fruit & Fibre, Post Grape-Nuts, Post Honeycomb, Post Honey Bunches of Oats, Post Oat Flakes, Post Raisin Bran, Post Toasties, Sure-Jell, Stove Top, Post Grape [illegible]: Grey Advertising, New York. Jack Frantz, exec vp.

Brim, Country Time, Log Cabin Syrup, Maxwell House coffees, Post Super Golden Crisp, Post Alpha Bits, Post Pebbles, Shake 'n Bake, Tang, Yuban: Ogilvy & Mather, New York. Jack Reed, Rick Roth, sr vps-exec grp dirs.

General Foods Int'l Coffees, Jell-O brand desserts, Sanka brand decaffeinated coffee: Young & Rubicam, New York. Susan Gianinno, exec vp-grp dir.

KRAFT GENERAL FOODS COMMERCIAL PRODUCTS: One Parkway North/Deerfield, Ill. 60015/Phone: (708) 405-8500. Kraft General Foods Commercial Products consists of Kraft Foodservice and Kraft Food Ingredients.

KRAFT FOODSERVICE: One Parkway North/Deerfield, Ill. 60015/Phone: (708) 405-8500. Gary Karp, vp-Kraft branded prod sales and mktg; Rick Wallace, dir-mktg, Kraft branded prods; Patsy J. Mellott, dir-trade mktg and comms.

Bayfield County, [illegible], Bull's Eye, Casino, [illegible], Cheez Whiz, Country [illegible], Cracker Barrel, [illegible], Excelsior, Flavor Fry, Handi-Snacks, House Dressings by Kraft, Kraft, Kraft Free, Kraft Food Service, Kraft Foodservice Gourmet, Kraft Foodservice Prestige, Kraft Foodservice Premier, Kraft Foodservice Preferred, KFS, Kraft "Thick 'n Spicy," [illegible], Miracle Whip, [illegible], Natural Reserve, Old English, Optima, Parkay, Philadelphia Brand, [illegible], Rancher's Choice, [illegible], Salad [illegible], South Street, [illegible], [illegible], Velveeta: Ketchum Advertising, Chicago. Andrea Mallen, vp-acct svcs.

KRAFT FOOD INGREDIENTS: 6410 Poplar Ave./Memphis, Tenn. 38119/Phone: (901) 766-2100. Terry Reagan, dir-mktg, commercial prods, Max Maxwell, sr mktg mgr-foodservice; David Compton, mktg mgr-new prods; Russ Williams, dir-flavor ingredients; Paul Kenby, dir-confection prods, Bob Milewski, dir-refrigerated prods; Steve Robinson, dir-mktg.

Anderson Clayton/Humko Products, Baker's Chocolate & Coconut, California Vegetable Concentrates, KFI Private Label Products, KFI Specialty Ingredients, Mrs. Tucker's Shortening, Oil, Margarine Products, Seafood Creamer, Unique Cheese Analog, [illegible] Shortening & Oil Products: Archer/Malmo, Memphis, Tenn. Bob O'Conner, acct dir.

California Vegetable Concentrates: Boling & Associates, Fresno, Calif. Jan Boling, acct dir.

MILLER BREWING CO.: 3939 W. Highland Blvd./Milwaukee, Wis. 53201/Phone: (414) 931-2000. Richard Strup, vp-brand mgmt; Tony Sciolla, brand mgr, Miller Genuine Draft; Alice Frazier, Alan Smith, Bill Dreger, assoc brand mgrs, Miller Genuine Draft; Mark Ziskind, brand mgr, Miller Genuine Draft Light; Laurie Panosh, asst brand mgr, Miller Genuine Draft Light; Sharon Ali, brand mgr, Miller High Life and Leinenkugel's; Rich Reider, asst brand mgr, Miller High Life; Paul Basquin, low calorie category dir, Sharp's; Rob Olejniczak, brand mgr, Lite; John Beck, Rodney Northern, assoc brand mgrs, Lite; Ann Janikowsky, brand mgr, Sharp's; Steve Wnuk, assoc brand mgr, Sharp's; Ann Vost, brand asst, Sharp's; Jeff Schouten, category dir, Allied Brands; Chuck Strehl, genl sales mgr, Leinenkugel's; Megan Loch, asst brand mgr, Reserve; Chad Vincent, brand mgr, Reserve, Lowenbrau; Mark Wildman, assoc brand mgr, Allied Brands; Jeff Rea, new bus devel, category dir; Rick Burton, Jay Lenstrom, Jennifer Achuck, brand mgrs, new prods; Karen Huber, assoc brand mgr; Robert Ward, dir of adv svcs; Robin Peterson, David Dutton, media mgrs; Mary Genske, Pat Taflinger, assoc media mgrs.

Magnum, Meister Brau, Miller High Life, Miller Lite, Milwaukee's Best: Leo Burnett USA, Chicago. John Miller, exec vp.

Genuine Draft, Genuine Draft Light: Backer Spielvogel Bates Worldwide, New York. Frank Assumma, exec vp.

Hispanic mktg for all Miller Brewing Co. brands: Casnova Pendril, Irvine, Calif.; Randy Ransome, acct dir.

Lowenbrau: J. Walter Thompson USA, Chicago. Bob Hall, sr vp-mg dir.

Leinenkugel's, Sharp's, responsible drinking campaign: Frankenberry, Laughlin & Constable, Milwaukee. Steve Laughlin, partner.

Black consumer mktg for all Miller Brewing brands: The Mingo Group, New York. Sam Chisholm, pres.

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RANK: 73

Philips NV

Eindhoven, The Netherlands
Ad spending: **$133.1** million

U.S. AD SPENDING ($ in thousands)

By media	**1991**	**1990**	**% chg**
Magazine	11,733	20,432	-42.6
Sunday magazine	12	513	-97.6
Newspaper	3,980	108	NA
Outdoor	42	24	77.0
Network TV	45,858	62,789	-27.0
Spot TV	401	302	32.9
Syndicated TV	2,783	2,865	-2.9
Cable TV networks	1,937	2,047	-5.4
Network radio	0	11	NA
Spot radio	0	19	NA
Measured media	66,746	89,109	-25.1
Unmeasured	66,400	88,600	-25.1
Total	133,146	177,709	-25.1
By top brands	**1991**	**1990**	**% chg**
Norelco shavers	32,677	46,973	-30.4
Magnavox electronic equipment	14,808	0	NA
Magnavox video equipment	5,842	21,880	-73.3

SALES & EARNINGS ($ in millions)

Worldwide	**1991**	**1990**	**% chg**
Sales	33,052	32,901	0.5
Earnings	697	(2,502)	NA
U.S.	**1991**	**1990**	**% chg**
Sales	7,443	6,973	6.7
Income from operations	(11)	(362)	NA
Division sales	**1991**	**1990**	**% chg**
Lighting	4,264	4,145	2.9
Consumer electronics	15,579	15,255	2.1
Professional prods	7,256	7,316	-0.8
Components	4,550	4,692	-3.0
Miscellaneous	1,404	1,492	-5.9

CORPORATE PROFILE

Philips Consumer Electronics, the U.S. operation of Philips NV, is betting on the compact disc-interactive and digital compact cassette technologies to shore up its sagging bottom line which has recorded negative growth the past two years.

CD-I, which combines some of the elements of computers with videogames and CDs, was launched last year. But this year, Philips gains two key advantages: Eastman Kodak Co. is moving into the consumer market with its Photo CD system, which allows viewing of pictures on TV and is compatible with CD-I.

Philips has come up with an add-on that allows CD-I to play TV shows and some movies, complete with stereo sound.

Philips is hoping CD-I will bolster the company's high-tech image in the U.S. in a way that will translate to other products.

While CD-I will get the bulk of the division's additional ad support, the digital compact cassette system may get most of the public attention.

DCC allows digital cassette tapes to be played and recorded in machines compatible with old audiocassettes. Philips and Matsushita Electric Industrial Co. will introduce DCC this fall with other electronics makers also signing on to the format.

Philips had planned to introduce the format early this fall but postponed introduction to solve some initial production problems.

Last year, Philips saw its share of the U.S. market drop in camcorders to 5.5% from 7.5% in 1990; rise for VCRs to 9.8% from 8%; and rise for TVs to 12% from 11.9%, according to *TV Digest*.

Philips bowed out of the personal computer market last year, a move that did not have much impact on its U.S. operations. Its personal computers have never been a factor in the U.S. market. Philips will remain a computer supplier and marketer of monitors. The company did cut back on some U.S. staff, however.

Philips Lighting last year and this year continued in its course of looking to new products to avoid the price pressures in the basic light-bulb segment.

No. 2 in bulb sales with about 20% of the market (behind General Electric Co.), Philips introduced Mini Earthlight, a compact fluorescent bulb that screws into regular bulb sockets; and SLS, an even more compact fluorescent. This fall, Philips will introduce its first Christmas tree lights under the Philips Tangle Free name. Last year, Philips supported its light bulbs with only $1.1 million, down 76%.

Philips Lighting launched a new campaign that abandoned humor for a "decorate with light" theme. It also dropped network TV for spot TV in 31 markets where its spots were tagged with retailer identifications.

Norelco Consumer Products continued its concentration on electric shavers, irons and clean air machines, even as it heightened its search for new product lines. Norelco estimates it now holds 53% of the men's electric shaver market by volume and 58% by price; it has 34% of women's shavers by both measures.

Norelco reduced ad spending last year after introducing some new shaver lines in 1990, with the biggest cut dropping spending on men's shavers by 30% to $28 million, according to LNA/Arbitron Multi-Media Service.

Philips NV owns 80% of PolyGram NV, which last year announced plans to further expand from audio recordings and distribution into films, setting up PolyGram Filmed Entertainment as a U.S. subsidiary.

PolyGram joined Universal Pictures in a 50/50 joint venture called Gramercy Pictures. That unit in turn agreed to distribute for several companies wholly or partially owned by PolyGram.

PolyGram last month agreed to buy a 51% interest in Interscope, the film production company headed by Ted Field that has produced more than 25 pictures, including "Three Men & a Baby."

HEADQUARTERS

Philips International BV, P.O. Box 218/5600 MD/ Eindhoven/Netherlands.

North American Philips Corp./100 E. 42nd St./New York, N.Y. 10017/Phone: (212) 850-5000.

PERSONNEL, BRANDS, AGENCIES

PHILIPS CONSUMER ELECTRONICS: One Philips Drive/Knoxville, Tenn. 37914-1810/Phone: (615) 521-4316. Mike Keel, dir-adv.

Magnavox, Philips, Sylvania, Philco: Backer Spielvogel Bates Worldwide, New York. Jerry Gottlieb, exec vp-acct mgmt.

NORELCO CONSUMER PRODUCTS: Highridge Park/Stamford, Conn. 06904/Phone: (203) 329-2400. Patrick Dinley, pres; Leigh Alexander, sr mktg mgr-razors; Ed Crawford, sr mktg mgr-home comfort grp.

Norelco, Philips: D'Arcy Masius Benton & Bowles, New York. Ira Schwartz, sr vp-grp dir.

PHILIPS INTERACTIVE MEDIA OF AMERICA: 11111 Santa Monica Blvd./Los Angeles, Calif. 90025/Phone: (310) 444-6600. Richard Arroyo, sr vp-mktg.

Philips CD-I Software: Backer Spielvogel Bates Worldwide, New York. Jerry Gottlieb, exec vp-acct mgmt.

PHILIPS LIGHTING CO.: Philips Square/200 Franklin Square Drive/P.O. Box 6800/Somerset, N.J. 08875-6800/Phone: (908) 563-3000. John Stasiw, vp-gm, consumer div; David Wickware, dir-mktg; Maureen Carpenter, mgr-marketing communications.

Philips lighting: McKinney & Silver, Raleigh, N.C. Rick Myracle, sr vp-mgmt sup.

POLYGRAM CORP.: 825 8th Ave./New York, N.Y. 10019/Phone: (212) 333-8000.

Dane Benable, vp-prod devel, Mercury Records; Dan Brotman, mgr-adv, PolyGram Classics & Jazz; Susie Penley, mgr-adv, PolyGram Classics & Jazz-Verve/ECM; Steve Miller, natl dir-sales/mktg, Mercury Nashville; Jim Caparro, president PolyGram Distribution; Jeff Jones, vp-PolyGram label grp mktg; Matthew Stringer, vp-mktg, Island Records; Jim Guerinot, vp-mktg, A&M Records; Celia Hirschman, exec dir-mktg; Kate Tews, dir of advertising; Michael Kuhn, pres PolyGram Filmed Entertainment; Russell Schwartz, pres Gramercy Pictures (joint venture).

Mercury Records: Mercury, Atlanta Artists, Big Life, Fontana, Jambco, PWL, rooArt, Wing. Polygram Classics & Jazz: Verve, Deutsche Grammophon, ECM, London, Philips. Mercury Nashville. PolyGram Label Group: FFRR, [illegible], London, Polydor, Smash, Vertigo. Island Records. A&M Records: [illegible], [illegible], [illegible], Horizon, Perspective, Tabu: Phonad, New York (in-house). Sylvia Chandler, mgr-merch; Leslie Borrok, mgr-adv.

RANK: 1

Procter & Gamble Co.

Cincinnati
Ad spending: **$2,149.0** million

U.S. AD SPENDING ($ in thousands)

By media	**1991**	**1990**	**% chg**
Magazine	142,900	154,683	-7.6
Sunday magazine	4,310	6,260	-31.1
Newspaper	3,699	6,418	-42.4
Outdoor	517	523	-1.3
Network TV	515,697	559,894	-7.9
Spot TV	283,650	304,150	-6.7
Syndicated TV	131,783	119,258	10.5
Cable TV networks	67,824	57,936	17.1
Network radio	10,810	17,620	-38.6
Spot radio	5,265	9,381	-43.9
Measured media	1,166,455	1,236,123	-5.6
Unmeasured	982,500	1,041,200	-5.6
Total	2,148,955	2,277,323	-5.6
By top brands	**1991**	**1990**	**% chg**
Folgers coffees	67,753	96,876	-30.1
Tide laundry products	51,062	62,009	-17.7
Crest toothpaste	44,784	43,810	2.2
Head & Shoulders shampoos	34,603	35,915	-3.7
Nyquil cold products	31,929	29,528	8.1
Pampers diapers	29,151	27,022	7.9
Cheer laundry detergent	26,100	31,410	-16.9
Downy fabric softener	25,425	30,777	-17.4
Always feminine protection	24,264	16,196	49.9
Cover Girl eye make-up	24,226	14,360	68.6

SALES & EARNINGS ($ in millions)

Worldwide	**1992**	**1991**	**% chg**
Sales	29,362	27,026	8.6
Earnings	1,872	1,773	5.5

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U.S.	1992	1991	% chg
Sales	15,579	15,276	2.1
Net earnings	1,461	1,360	7.4
Division sales	**1992**	**1991**	**% chg**
Laundry & cleaning	9,531	9,002	5.9
Personal care	15,142	13,468	12.4
Food & beverage	3,709	3,546	4.6
Pulp & chemicals	1,429	1,709	-16.4

CORPORATE PROFILE

Procter & Gamble Co. intends to generate greater brand loyalty through a new value-pricing strategy.

The company in the past year reduced trade allowances to retailers in exchange for lower everyday list prices. The goal is to offer consumers everyday low prices and minimize the wide price swings that prompt shoppers to switch brands.

Although some retailers that rely on high/low pricing strategies object to the plan, P&G eventually hopes to convince retailers they will benefit from added value on a day-in, day-out basis.

P&G estimates that in a number of categories, it is lowering prices even more than the promotion and pricing dollars it has taken away from the retailer. The strategy now covers about 50% to 60% of P&G's business, including items in the food and beverage, laundry and cleaning, and health & beauty-care sectors.

P&G at the same time is launching a long list of new products. It is going national with Pert Plus for Kids, Ultra Downy, Crest Complete toothbrush and Liquid Safeguard anti-bacterial soap.

The company in February began testing seven ultra liquid compact detergents following the recent success of concentrated powder detergents. The brands are Ultra Liquid Cheer With Color Guard, Ultra Liquid Cheerfree, Ultra Liquid Dash, Ultra Era and Ultra Liquid Tide in regular, unscented and bleach versions.

P&G remains the dominant player in the $3.6 billion laundry detergent category with a 55.5% share. Its top sellers are No. 1 Tide and No. 2 Tide With Bleach. P&G's Gain detergent, the No. 7 brand, jumped to a 4.6% share for the 52-week period ended May 23, 1992, from a 2.7% share in the prior-year period, according to Nielsen Marketing Research.

Ultra Dry Pampers Phases and Ultra Dry Luvs Phases rolled national this year replacing previous versions that went global last year. The diapers are tailored to meet a child's developmental stages.

P&G is the leading marketer in the $2 billion-plus disposable diaper market with a 49.6% combined share for Pampers (29.2%) and Luvs (20.4%). Kimberly-Clark's Huggies is the top brand at 30.1% at midyear 1992, according to Nielsen.

P&G, which ran head-on into the FDA in 1991 over its use of the term "fresh" on Citrus Hill orange juice labels, is now positioning the brand on health benefits. A medical study showed children who were given a highly absorbable calcium found in Citrus Hill Plus Calcium developed stronger and denser bones than children who received only the recommended daily allowance.

Citrus Hill is a distant No. 3 in the $3 billion orange juice market with a 7.8% share for the 52 weeks ended April 18.

P&G is boosting its bar soap business after relinquishing the lead position to Unilever's Lever Bros., which now has a 32.5% share of the $930 million bar soap derby on the strength of its Lever 2000 brand vs. 26.7% for P&G.

P&G is testing a bar soap called Whitewater Fresh Zest. The bar is white, instead of green like traditional Zest, and is beveled like competitor Unilever's Lever 2000. The new product is expected to contain Ages, a mild cleanser that's been used in the Oil of Olay Conditioning Bar in test since 1990. The Oil of Olay bar is expected to go national by yearend with a $50 million marketing budget.

P&G is now the leader in the U.S. cosmetics market, with a 34% share in 1991 for its Cover Girl, Clarion and Max Factor lines, running ahead of Revlon's 22.5% share for its Revlon and Almay lines.

HEADQUARTERS

Procter & Gamble Co./One Procter & Gamble Plaza/Cincinnati, Ohio 45202/P.O. Box 599/Cincinnati, Ohio 45201/Phone: (513) 983-1100

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Edwin L. Artzt, chmn; John E. Pepper, pres; Gerald V. Dirvin, Durk I. Jager, exec vps; Gordon F. Brunner, sr vp rsch/devel; Robert J. Herbold, sr vp-info svcs/adv; Lawrence D. Milligan, sr vp-sales; Michael J. Allen, Wolfgang C. Berndt, Robert T. Blanchard, Bruce L. Byrnes, Larry G. Dare, Stephen P. Donovan Jr., Harald Einsmann, Alan G. Lafley, Jorge P. Montoya, grp vps; L. Ross Love, vp-adv; James Van Cleave, vp-media & programming; John Saxton, vp-cosmetic & fragrance prods; Frank Smith, vp-commercial svc prods; Jeffrey Jones, vp-paper prods; Thomas Moore, vp-healthcare prods; Mark Upson III, vp, food & beverage prods; Walker Wallace, vp-Olestra; Gary Breissinger, vp-sales; G. Gilbert Cloyd, vp-pharmaceuticals; Mark Collar, vp-gm, deodorants/Old Spice; Mark Levy, vp-gm, personal cleansing prods; Martin Nuechtern, vp-gm-haircare prods; Randolph Rogge, vp-gm, skincare prods; Robert Gill, vp-gm, snacks; John Bess, vp-gm, dishwashing prods; R. Kerry Clark, vp-gm, laundry prods; Steven David, vp-gm, fabric conditioners; Gregory Lawton, vp-gm, facial tissue & catamenials; Peter Elsing, vp-gm, oral care prods; Gerald Perkinson, vp-gm, analgesic prods.

Bold, Crest Complete, Cheer, Era Plus, Gleem, Lava liquid & bar soaps, Luvs disposable diapers, Secret, Pert Plus, White Cloud, Pepto-Bismol, Prell, Clarion cosmetics, Noxzema: Leo Burnett USA, Chicago. Mary Bishop, exec vp-acct dir.

Black adv: Crest, Crisco shortening, Tide: Burrell Advertising, Chicago. Fay Ferguson, vp-mgmt super.

Bounce, Dash, Dawn, Ivory Snow, Crest, Fasteeth, Fixodent, Vicks Formula 44, Nyquil, Percogesic, Vicks Vaporub, Scope, Sinex, Clearasil, Always, Attends, Charmin, Pampers, Wondra: D'Arcy Masius Benton & Bowles, New York. Barcus Nankin Schwartz Partnership (Always, Attends, Bounce, Dawn): Ira Schwartz, sr vp-group acct dir; Alan Barcus, Harold Nankin, sr vp-creative dirs. Gangi Love Partnership: Bill Gangi, sr vp-creative dir; Tim Love, sr vp-group acct dir. Charoff Sherman Partnership (Vicks healthcare prods, Vicks personal care prods, P&G healthcare prods): Ken Charoff, sr vp-creative dir, Norm Sherman, sr vp-group acct dir.

Navy by Cover Girl, Max Factor cosmetics, California for Women/Men fragrances, Incognito fragrance, Le Jardin fragrance, new prods: Lotas Minard Patton McIver, New York. Sally Minard, partner; Dick Ellington, exec vp-acct mgr, fragrances; Cynthia Kemp, acct dir Procter & Gamble fragrances; Bob Knapp, acct dir, Max Factor cosmetics.

Professional adv—Charmin Care, Crest, Head & Shoulders, Pepto-Bismol, Puffs, Scope, Norwich International: Medicus Intercon International, New York. Scope—Dean Schwartz, dir-oper & strategy; Betsy Shulman, acct dir; Beth Kostecka, assoc acct mgr. Crest—Justin Harrington, acct mgr; Howard Courtenmanche, Wendy Spielman, assoc acct mgrs.

Cover Girl Cosmetics, Downy fabric softener-liquid & dryer sheets, Joy, Crisco shortening and Crisco cooking oil, Puritan oil, Jif, Lestoil cleaner, Pantene haircare line, Sure: Grey Advertising, New York. Neil Kreisberg, exec vp.

Professional adv—Crisco oil, Citrus Hill Plus Calcium, Folgers decaf, Speas Farm juices, Bain de Soleil, Oil of Olay, Ivory bar soap and liquid, Safeguard: Gross Townsend Frank Hoffman, New York. Cindy Machles, group acct super, skincare; Glenn Greenberg, group acct super, food.

Sunny Delight: Gumpertz/Bentley/Fried, Los Angeles. Richard Fried, pres-mgmt super.

Bounty, Cinch, Fisher Nut, Safeguard, Top Job, Zest: Jordan, McGrath, Case & Taylor, New York. Alice Bond, exec vp.

Foodservice cleaning products, coin vending cleaning prods: Ketchum Advertising, Chicago. Lee Lippman, pres.

Professional adv—Asacol and Dantrium: Klemtner Advertising, New York. Marvin Amster, acct dir; Aniko Burzo, vp media dir.

Children's Nyquil, Chloraseptic, Pediatric Formula 44, Peridex, Benzagel: Lally, McFarland & Pantello, New York. Laura Krein, Joni Honig, vp-mgmt supers.

Folgers regular and decaffeinated coffee, Puffs, Citrus Hill juices, Certain, Duncan Hines baking mix line, Hawaiian Punch, Ivory shampoo, Bain de Soleil suncare line: N W Ayer, New York. Warren E. Albright, exec vp.

Foodservice & lodging prods, shortening & oils, coffee, bar soap & amenities, Attends: industrial, chemical grocery trade, drug trade & military adv: Northlich Stolley LaWarre, Cincinnati. Steve Rost, sr vp-dir client svcs.

Tide detergents, Cascade, Camay, Comet, Dreft, Ivory bar soap & liquid, Oxydol, Solo, Spic & Span: Saatchi & Saatchi Advertising, New York. Paula Forman, exec vp-exec mgmt dir.

Biz, Chloraseptic, Mr. Clean, Coast, Comet liquid bleach, Head & Shoulders, Metamucil, Vicks Throat Drops, Old Spice, Vidal Sassoon haircare line: Tatham/RSCG, Chicago. Robert Hielscher, sr partner-client svcs dir.

Gain, Oil of Olay and Olay Bath Bar, Pringles, Duncan Hines cookies: Wells Rich Greene BDDP, New York. Dick Byrne, exec vp-co dir acct svcs; Chris Hansen, exec vp-dir acct svcs.

RANK: 41

Quaker Oats Co.

Chicago

Ad spending: **$237.7** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	26,086	24,510	6.4
Sunday magazine	459	107	328.1
Newspaper	831	1,556	-46.6
Outdoor	287	486	-40.9
Network TV	39,330	54,927	-28.4
Spot TV	24,641	34,307	-28.2
Syndicated TV	11,886	9,629	23.4
Cable TV networks	4,548	2,147	111.8
Network radio	1,692	3,418	-50.5
Spot radio	1,950	3,273	-40.4
Measured media	111,711	134,361	-16.9
Unmeasured	126,000	133,800	-5.8
Total	237,711	268,161	-11.4
By top brands	**1991**	**1990**	**% chg**
Quaker cereal	38,366	49,346	-22.3
Gatorade drinks	24,277	25,542	-5.0
Cap'n Crunch cereal	12,260	11,272	8.8
Life cereal	9,442	9,792	-3.6
Ken-L Ration dog food	6,483	10,194	-36.4
Gaines dog food	5,575	1,101	406.5
Golden Grain Rice-a-Roni	5,093	3,930	29.6

SALES & EARNINGS ($ in millions)

Worldwide	1992	1991	% chg
Sales	5,576	5,491	1.6
Earnings	248	206	20.3
U.S.	**1992**	**1991**	**% chg**
Sales	3,842	3,860	-0.5
Operating income	435	429	1.4
Division sales	**1992**	**1991**	**% chg**
U.S. & Canadian grocery	3,842	3,860	-0.5
International grocery	1,734	1,631	6.3

CORPORATE PROFILE

Gatorade sports drink, with worldwide sales approaching $1 billion, continues as Quaker Oats Co.'s biggest brand and key growth vehicle.

Early this year, Quaker set up a worldwide unit to coordinate all Gatorade marketing efforts, especially sports marketing.

Gatorade owns the estimated $500 million U.S. market for sports drinks with about a 94% share.

Among shelf-stable beverages, Gatorade ranked No. 2 behind Ocean Spray, with 17.9% of market for the 52 weeks ended May 16, according to Nielsen Marketing Research. That's up from 17.1% for the year-earlier period.

Quaker is bolstering Gatorade's position with new products, adding a grape flavor this year, and expanding distribution of 32-ounce plastic jugs. Quaker continued to use Gatorade's "Be like Mike" U.S. campaign, starring the Chicago Bulls' Michael Jordan.

For the third consecutive year, Quaker pared its overall ad budget, restricting spending to a few key products in most of its food businesses. Measured spending dropped 16.9% to $111.7 million in 1991, according to LNA/Arbitron Multi-Media Service. More than half of the decline resulted from Quaker spinning off its Fisher-Price division into a separate company in 1991.

The company's ready-to-eat cereal business remains hard pressed to keep up with the competition. In the $8 billion ready-to-eat cereal category, Quaker lost ground again last year, taking a 7.1% dollar share for the 52 weeks ended April 18, 1992, Nielsen reported.

Quaker trails Kellogg Co. with a 36.5% share, General Mills with 29.4% and Kraft General Foods' Post division with 11.3%. Quaker's high mark was 8% in 1988.

Sales of Quaker's key cereal brand, Cap'n Crunch, were flat, giving the brand a 2.8% share vs. more than 3% for 1990. Quaker 100% Natural cereal staggered when Kellogg introduced a low-fat granola cereal in February. Quaker responded with a low-fat variety of 100% Natural. Kellogg's product took more than 1% of the market in six months.

Other core Quaker brands are Life and Quaker Oat Squares.

Quaker this fall is launching a new cold cereal, Quaker Toasted Oatmeal. The cold oatmeal-flake cereal in original and honey nut, ties strongly into Quaker's hot cereal line by adapting the hallmark red and blue Quaker Oats package and prominently featuring the Quaker man.

Hot cereal continued as one of Quaker's bedrock businesses, taking about 60% of the $775 million hot cereal market. This fall, the company is introducing two hot cereals, Quaker Multigrain and Quaker Oats Plus Fiber. David Bere, appointed president of the breakfast division in April, is leading the fall effort.

Quaker took 10.9% of the $4.7 billion pet food category last year, up from 10.5% the previous year, according to Nielsen. Quaker now ranks fifth among six major players.

More than half of Quaker's pet food business comes from three lines: Cycle, which became a $105 million franchise after being relaunched as Advanced Nutrition Cycle last year in a $37 million ad campaign; Kibbles 'n Bits, a $100 million franchise; and pet treats. Its strategy is to build these growth products with added spending and line extensions.

HEADQUARTERS

Quaker Oats Co./Quaker Tower/321 N. Clark St./Chicago, Ill. 60610-4714/P.O. Box 049001/Chicago, Ill. 60604-9001/Phone: (312) 222-7111.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: William D. Smithburg, chmn, pres-ceo; Philip A. Marineau, exec vp-coo.

U.S. AND CANADIAN GROCERY PRODS: Quaker Tower/321 N. Clark St./Chicago, Ill. 60610-4714/P.O. Box 049001/Chicago, Ill. 60604-9001/Phone: (312) 222-7111. David R. Nogle, sr vp; John Blair, vp- mktg svcs/new ventures; C. Clarkson Hine, vp-adv; Jerry Perkins, vp-sales promo.

Hispanic adv: Berry-Brown Advertising, Dallas. Patricia Magel, vp-acct super.

African-American adv: Burrell Advertising, Chicago. Charles McClellan, vp-acct dir.

BREAKFAST DIV: Quaker Tower/321 N. Clark St./Chicago, Ill. 60610-4714/P.O. Box 049001/Chicago, Ill. 60604-9001/Phone: (312) 222-7111. David Bere, sr vp-pres; John Breuer, pres-U.S. cereals; Keith Robinson, vp-hot cereals; Polly Kawalik, vp-wholesome variety.

Aunt Jemima products, Life, 100% Natural cereal, Quaker Oat Squares, Quaker Oats & Instant Oatmeal: Jordan, McGrath, Case & Taylor, New York. Bruce Guidotti, exec vp-acct grp dir.

Cap'n Crunch, Crunchy Bran, Kretschmer wheat germ, Oh!s, Puffed Rice, Puffed Wheat, Quaker Oat Bran, Tiny Toons, new products: Bayer Bess Vanderwarker, Chicago. R. Brian Goodall, exec vp-dir, acct mgmt.

Industrial cereals, health foods: Bender, Browning, Dolby & Sanderson, Chicago. Kathleen Truty, acct super.

Granola bars, Quaker corn goods, rice & grain cakes, grits: Berry-Brown Advertising, Dallas. Patricia Magel, vp-acct super.

GATORADE WORLDWIDE DIV: Quaker Tower/321 N. Clark St./Chicago, Ill. 60610-4714/P.O. Box 049001/Chicago, Ill. 60604-9001/Phone: (312) 222-7111. Peter J. Vitulli, pres-Gatorade, U.S. and Canada; William Schmidt, vp-Gatorade Worldwide Sports Marketing; Peggy Dyer, vp-mktg; Deborah Kelly, vp-new beverages.

Gatorade and Gatorade Light: Bayer Bess Vanderwarker, Chicago. R. Brian Goodall, exec vp-dir, acct mgmt.

CONVENIENCE FOODS DIV: Quaker Tower/321 N. Clark St./Chicago, Ill. 60610-4714/P.O. Box 049001/Chicago, Ill. 60604-9001/Phone: (312) 222-7111. Walter G. VanBenthuysen, sr vp/pres-Convenience Foods Div; Lyle Hubbard, pres-Frozen Foods, Van Camps and Wolf Brand; Paul Barron, vp-mktg-Food Service.

Stokely Van Camp's beans, Wolf brand chili: Berry-Brown Advertising, Dallas. Patricia Magel, vp-acct super.

Aunt Jemima products: Jordan, McGrath, Case & Taylor, New York. Bruce Guidotti, exec vp-acct grp dir.

Quaker OvenStuffs: Bayer Bess Vanderwarker, Chicago: R. Brian Goodall, exec vp-dir, acct mgmt.

Celeste Pizza: Berry-Brown Advertising, Dallas. Patricia Magel, vp-acct super.

Pritikin: Frank C. Nahser Inc., Chicago. Thomas Perlitz, sr vp.

PET FOODS: Quaker Tower/321 N. Clark St./Chicago, Ill. 60610-4714/P.O. Box 049001/Chicago, Ill. 60604-9001/Phone: (312) 222-7111. Douglas Mills, sr vp-pres, Diversified Grocery Products; Mark Shapiro, vp-mktg.

Cycle, Gravy Train: Bayer Bess Vanderwarker, Chicago. R. Brian Goodall, exec vp-dir, acct mgmt.

Kibbles 'n Bits 'n Bits 'n Bits, King Kuts, dog and cat treats: J. Walter Thompson USA, Chicago. John Wells, sr vp.

GOLDEN GRAIN: 1111 139th Ave./P.O. Box 5148/San Leandro, Calif. 94578/Phone: (510) 357-8400. David Bere, pres.

Noodle-Roni, Rice-A-Roni: Goldberg Moser O'Neill/San Francisco. Gail Piper, mgmt super.

Mission Pasta, Golden Grain: Account in review.

RANK: 27

Ralston Purina Co.

St. Louis

Ad spending: **$393.5** million

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Photo location at Pitot House, New Orleans. Clothing provided by Laura Ashley, flowers by Key Florals.

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	24,240	26,272	-7.7
Sunday magazine	912	3,112	-70.7
Newspaper	1,715	1,108	54.8
Outdoor	125	145	-14.0
Network TV	60,812	48,525	25.3
Spot TV	21,629	26,845	-19.4
Syndicated TV	19,196	11,805	62.6
Cable TV networks	10,689	7,620	40.3
Network radio	1,075	0	NA
Spot radio	1,245	2,177	-42.8
Measured media	141,637	127,609	11.0
Unmeasured	251,900	226,900	11.0
Total	393,537	354,509	11.0
By top brands	**1991**	**1990**	**% chg**
Eveready battrs/flashls	44,512	29,006	53.5
Purina dog food	34,720	24,096	44.1
Chex cereals	18,829	14,946	26.0
Purina cat food	8,641	7,136	21.1
Purina pet foods	6,679	2,500	167.2
Hostess cakes & pies	5,693	10,746	-47.0

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	7,376	7,101	3.9
Earnings	392	396	-1.0
U.S.	**1991**	**1990**	**% chg**
Sales	5,210	5,084	2.5
Operating profit	715	716	-0.0
Division sales	**1991**	**1990**	**% chg**
Bakery prods	1,966	1,957	0.5
Pet foods	1,725	1,701	1.4
Cereals	532	508	4.8
Battery products	1,559	1,542	7.6
Agricultural products	924	907	1.9
Soy protein products	255	262	-2.6
Other	315	226	39.2

CORPORATE PROFILE

For the second year in a row, Ralston Purina Co.'s soft underbelly of pet food and bakery products was cinched up by strong sales from batteries and domestic cereals.

Sales of pet food—the company's largest and most important profit center accounting for more than 40% of Ralston's operating income—were up just 1.4% to $1.7 billion in the fiscal year ended Sept. 30, 1991.

Business was affected by intense competitive pressure, recession-driven consumer demand for lower-price products and lack of growth in the number of new pet owners.

Even so, offsetting those conditions was the strong performance of the Purina O.N.E. pet food line, which the company expanded in the spring of 1991 to compete head to head with Iams Co. and Hill's Pet Products' Science Diet. The broadened line was backed with a $40 million to $50 million marketing budget.

In just one year, Purina O.N.E. dog food sales alone jumped 36%, turning it into a $70 million-plus franchise with 17 different items vs. two items in 1990.

Purina O.N.E. is being sold in supermarkets, where consumers continue to spend $6 billion a year on pet food. The line is positioned as a high-end product costing 20% to 25% less than its rival brands sold in specialty stores.

In the past year, Purina has emphasized its full-line ad campaign, designed to strengthen mainstream brands Purina Dog Chow, Purina Puppy Chow, Hi Pro and Fit & Trim.

Purina cat food volumes were flat, with the market characterized by intense competition in all segments.

Ralston Purina leads the $4.7 billion pet food category (sales in supermarkets $2 million and over) with a 25.9% share for a 12-month period ended Feb. 22, down from 26.6% in 1991, noted Nielsen Marketing Research.

In the $8 billion ready-to-eat cereal category, Ralston ranked fifth with a 4.7% share vs. 4.9% in 1991, Nielsen reported. Volumes in children's cereal were down in fiscal 1991 because of several highly successful product introductions by competitors. But adult cereals, particularly the Chex franchise, achieved strong growth for the third consecutive year, in part due to line extensions.

Ralston also benefited from economy-minded consumers' switching to private-label cereals, of which Ralston is the primary producer with about a 95% share. Private-label cereals took 8.2% of the ready-to-eat cereal category for the first five months of 1992, compared with 8.1% in 1991 and 4.3% in 1988, Nielsen reported.

Last April, Ralston rolled out Urkel-Os, a licensed cereal based on the bespectacled Steve Urkel character from ABC-TV's "Family Matters." The product was launched with a $10 million marketing campaign. Late in 1991, it spent $8 million to roll out the Addams Family cereal. This followed disappointing results from cereals tied to movies in calendar '91: Prince of Thieves cereal and Bill & Ted's Excellent Cereal.

Eveready Battery Co., Ralston's key non-food business, continued the Energizer "Bunny" campaign. Sales of Energizer alkaline batteries in fiscal 1991 rose 14%, vs. 2% growth for the industry, as Eveready backed its products with $44.5 million, up 53.5% from 1990, according to LNA/Arbitron Multi-Media Service.

Eveready shelved Green Power, a "zero mercury-added" battery this year, but plans to use the technology in regular Energizer lines.

Ralston plans to spin off Continental Baking Co., marketer of Wonder bread and Hostess snack cakes, to Ralston shareholders.

HEADQUARTERS

Ralston Purina Co./One Checkerboard Square/St. Louis, Mo. 63164/Phone: (314) 982-1000

PERSONNEL, BRANDS, AGENCIES

CORPORATE: T.E. Touhill, exec vp-mgr dir. CheckMark Communications (in-house): Promotion/Creative Resources: G.C. Cook, vp-grp dir; Strategic Communications: J.K. Lucas, vp-grp dir; Media Resources: D.R. Martin, vp-grp dir.

GROCERY PRODUCTS DIV: Ralston Purina Co./One Checkerboard Square/St. Louis, Mo. 63164/Phone: (314) 982-1000. W.H. Lacey, chmn-ceo; W.P. McGinnis, pres-coo; T.E. Block, vp-dir, dog food mktg; J.R. von der Heydt, vp-dir, cat food mktg; A.R. Bresler, vp-dir, branded cereals; S.E. Burkhardt, dir-mktg, children's food grp; J.R. Sivewright, bus dir, store brand mktg.

Urkel-Os, Multi-Bran Chex, Almond Delight, Addams Family, Cookie Crisp, WWF Cereal, Batman Returns Cereal, Cat Line: Avrett, Free & Ginsberg, New York. John G. Avrett, chmn.

Tender Vittles, Meow Mix: DDB Needham Worldwide, Chicago. P. Winegar, vp-acct super.

Double Chex, Chex Snack Mix, Deli Cat, Beggin' Strips, Pet Line: Tatham/RSCG, Chicago. Thomas Schaeffer, sr partner-acct mgr.

Dog Line, Nature's Course: Fallon, McElligott, Minneapolis. Patrick R. Fallon, chmn.

Purina O.N.E.: Scali, McCabe, Sloves, New York. Stuart Epstein, exec vp.

O.N.E. Groomer, ProVisions, Breeder Enthusiast: Stockton, West, Burkhart, Cincinnati. Maureen Vogele, sr vp-dir client svcs.

RyKrisp, Butcher's Blend, Purina Biscuits, Bonz: Martin, Marshall, Jaccoma & Mitchell, New York. George Jaccoma, exec vp.

Pets for People, Katfish Pickins: Simmons, Durham & Associates, St. Louis. B.W. Durham, Jr., exec vp-treasurer.

Veterinary adv: John Volk Co., Chicago. John Volk, pres-acct super.

Dog food (Hispanic adv): Castor Advertising, New York. Feliberto Fernandez, pres.

CONTINENTAL BAKING CO.: One Checkerboard Square/St. Louis, Mo 63164/Phone: (314) 982-5800. J.W. Brown, chmn-ceo; R.W. Bracken, exec vp; J.T. Sweetwood, vp-dir, mktg/bread; R.M. Proctor, vp-dir, mktg/cake.

EVEREADY BATTERY CO.: One Checkerboard Square/St. Louis, Mo. 63164/800 Chouteau/St. Louis, Mo. 63102/Phone: (314) 982-2000. J.P. Mulcahy, chmn-ceo; G.L. Meffert, exec vp; W.M. Klein, vp-mktg; R.J. Smith, dir-brand mktg, diversified prods; D.P. Hatfield, dir-brand mktg, primary batteries.

Energizer: Chiat/Day/Mojo, Venice, Calif. Bob Kuperman, pres-ceo.

Hispanic adv: Casanova Advertising, Irvine, Calif. Paul L. Casanova, pres.

BEECH-NUT NUTRITION CO.: Ralston Purina Co./One Checkerboard Square/St. Louis, Mo. 63164/Phone: (314) 982-1000. J.A. Nichols, pres; S.P. Widham, grp dir.

Beech-Nut, Beech-Nut First Water: DDB Needham Worldwide, Chicago. P. Winegar, vp-acct super.

Hispanic adv: Conill Advertising, New York. A. Conill, mgmt super.

RANK: 84

Reebok International

Stoughton, Mass.
Ad spending: **$126.5** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	22,914	16,906	35.5
Sunday magazine	456	216	110.9
Newspaper	1,292	871	48.4
Outdoor	260	977	-73.4
Network TV	29,440	18,449	59.6
Spot TV	5,825	3,929	48.3
Syndicated TV	7,630	4,425	72.6
Cable TV networks	3,018	2,545	18.6
Spot radio	4,857	187	NA
Measured media	75,699	48,504	56.1
Unmeasured	50,800	32,500	56.3
Total	126,499	81,004	56.2
By top brands	**1991**	**1990**	**% chg**
Reebok footwear	59,288	38,489	54.0
Rockport shoes	5,321	3,426	55.3

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	2,734	2,159	26.6
Earnings	235	177	32.9
U.S.	**1991**	**1990**	**% chg**
Sales	1,883	1,665	13.7
Net income	140	136	2.5

CORPORATE PROFILE

Reebok International came out of the blocks hard in 1991 but couldn't make up the distance behind Nike, as both finished the year with gains of 2 share points.

Both Reebok and Nike had to work harder for their market shares in 1991, a year in which the U.S. industry grew only 4.2%, far from the 20% to 25% annual growth of past years.

Reebok, which lost its No. 1 position in athletic shoes to Nike in 1989, boosted advertising by 56.2% and finished the year with a 22.8% share of the $5.8 billion athletic shoe market, up about 2 points. The spread remained nearly 7 points short of Nike, which increased ad spending by 24.9%.

Ad dollars are likely to continue to soar for both marketers this year. Reebok has said it's spending at the rate of $220 million worldwide in 1992.

In 1991, Reebok sporting footwear for men and women got the biggest boost in measured media, up 60.6% to $53 million, according to LNA/Arbitron Multi-Media Service.

Trying to keep the lead in technology, Reebok expanded on the success of its innovative Pump shoe by introducing a version with two pumps last year. Early this year, it brought out the Insta-Pump, which uses a pressurized carbon dioxide cartridge to rapidly inflate air chambers in the athletic footwear.

The Pump, representing about 16% of Reebok annual sales, permits customized fitting, while Nike's Air series offers pre-filled air cushions.

Reebok rolled out the Blacktop, designed for playing basketball on outdoor courts, and this month introduced the Hard Court tennis shoe in a burst of TV spots during the U.S. Open.

Reebok ran headlong into Nike over Olympic airtime this year. To counter Reebok's $12 million exclusive category sponsorship in NBC's Olympic package, Nike entered the spot TV market with a vengeance, buying heavily in the top markets. Reebok countered by buying local retail time through its co-op budget with retailers such as Athlete's Foot Group and Foot Locker.

HEADQUARTERS

Reebok International/100 Technology Center Drive/Stoughton, Mass. 02072/Phone: (617) 341-5000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Dave Ropes, vp-worldwide adv; Ford Ennals, pres, Reebok Fitness; Roberto Muller, pres, Reebok Sport; Ron Campo, pres, Reebok Apparel.

Reebok Brand: Chiat/Day/Mojo, N.Y. Steve Friedman, senior vp-group mgt super.

Boks: Toth Design, Carlisle, Mass. Michael Toth, pres.

Weeboks, Golf, Boston Whaler: Mullen Advertising, Wenham, Mass. Jim Mullen, pres.

Avia: John Barrows, vp-adv/promo. Acct in review.

Ellesse: Tarlow Advertising, N.Y. Russ Gillsdorf, exec vp-dir of mktg and media svcs.

Rockport: Jordan, McGrath, Case & Taylor, N.Y. Enza Veltri, media super.

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RANK: 80

Revlon Group

New York

Ad spending: $128.0 million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	31,650	43,248	-26.8
Sunday magazine	640	2,805	-77.2
Newspaper	152	50	202.4
Outdoor	26	5	411.8
Network TV	4,832	12,614	-61.7
Spot TV	23,354	8,496	174.9
Syndicated TV	786	2,131	-63.1
Cable TV networks	2,213	2,189	1.1
Spot radio	236	87	171.3
Measured media	63,889	71,625	-10.8
Unmeasured	64,100	71,800	-10.7
Total	127,989	143,425	-10.8
By top brands	**1991**	**1990**	**% chg**
Revlon shampoos & conditioner	9,735	9,515	2.3
Revlon lipstick	5,812	2,193	165.1

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	1,476	1,511	-2.3
Earnings	(414)	(30)	NA
U.S.	**1991**	**1990**	**% chg**
Sales	928	921	0.8
Operating earnings	18	70	-74.0

CORPORATE PROFILE

Revlon improved its ranking in the $2.1 billion-plus cosmetics wars in 1991 while undertaking a major ongoing restructuring that culminated in failed plans to go public, at least for this year.

In 1992, the company continued to jettison non-core product lines, selling Halston fragrance and the pricey department store Princess Marcella Borghese cosmetics and skincare business to a Saudi Arabian family. Before that, the Arnold Scaasi designer fragrance business was sold to Tsumura International.

On the heels of the divestitures, Revlon in late May filed a prospectus to go public. Several months later Revlon yanked the offering, citing a less than stellar market for initial public offerings. Underwriters had questioned Revlon's ability to boost sales in 1992 by the amount cited in the prospectus.

Revlon has been aggressive in product introductions covering 1991 and 1992. They include Revlon New Essentials skincare, Nautica and Ellen Tracy fragrances, a revamped Revlon nail enamel, new ColorStyle Cosmetics for black women and, later this year, line extensions to the Almay brand.

Another mass-market skincare line called Recapture is set for introduction later this year, as are restagings of the Eterna and Moon Drops lines. A 1993 introduction of a fragrance called Wild Heart is planned, most probably bearing the endorsement of country singer Trisha Yearwood.

This year, Revlon signed Kathie Lee-Gifford as spokeswoman for Charles of the Ritz skincare and makeup, repositioning the line from the youth market to older, middle-American consumers.

Revlon boosted its market share in the cosmetics category to 22.5% in 1991 for its Revlon and Almay lines, from 20.4% in the prior year, cutting into market leader Procter & Gamble Co., whose share dipped slightly to 34% for its Cover Girl, Clarion and Max Factor lines.

HEADQUARTERS

Revlon Inc./625 Madison Ave./New York, N.Y. 10022/Phone: (212) 527-4000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Ronald O. Perelman, chmn; Jerry Levin, pres-ceo; Michael Hammond, pres, Revlon N Amer; Paul Block, pres, Revlon Intl; Robert Fox, exec vp; Dick Tarlow, pres, Tarlow Advertising (in-house); Geoffrey Donaldson, pres-Revlon Dept Stores Group; Andrea Robinson, pres-Revlon Specialty Stores; Lynn Kröminga, pres-Revlon Licensing; Daniel J. Moriarty, sr vp-pr.

Revlon, Almay, Ultima II, Revlon Fine Fragrances, Alexandra de Markoff, Jeanne Gatineau, Visage Beaute, Toiletries: Tarlow Advertising, New York (in-house).

Corporate media buying: Russell Gilsdorf, exec vp, Tarlow Advertising.

RANK: 10

RJR Nabisco

New York, N.Y.

Ad spending: $571.0 million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	61,610	78,600	-21.6
Sunday magazine	6,252	9,122	-31.5
Newspaper	3,170	10,936	-71.0
Outdoor	51,714	52,356	-1.2
Network TV	112,670	133,555	-15.6
Spot TV	8,776	17,313	-49.3
Syndicated TV	22,137	22,144	-0.0
Cable TV networks	17,795	21,667	-17.9
Network radio	809	1,560	-48.1
Spot radio	382	1,859	-79.5
Measured media	285,513	349,311	-18.3
Unmeasured	285,500	286,800	-0.5
Total	571,013	636,111	-10.2
By top brands	**1991**	**1990**	**% chg**
Nabisco cookies/crackers	60,195	94,904	-36.6
Winston cigarettes	45,330	18,729	142.0
Camel cigarettes	33,818	30,853	9.6
LifeSavers	19,757	15,660	26.2
Carefree gum	12,429	15,118	-17.8
Planters snacks	10,658	12,553	-15.1
Salem cigarettes	9,682	25,402	-61.9
Fleischmann's margarine & oils	9,295	14,150	-34.3
A-1 steak sauce	9,219	10,704	-13.9
Nabisco cereals	8,189	12,901	-36.5

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	14,989	13,879	8.0
Earnings	368	(429)	NA
U.S.	**1991**	**1990**	**% chg**
Sales	12,548	12,125	3.5
Operating income	2,692	2,696	-0.1
Division sales	**1991**	**1990**	**% chg**
Tobacco	8,540	8,053	6.0
Food	6,449	5,826	10.7

CORPORATE PROFILE

RJR Nabisco's sale to General Mills of its ready-to-eat cereals business, which includes the 100-year-old Shredded Wheat franchise, continues the company's policy of selling off chunks of its business to retire debt.

The latest divestiture, announced earlier this month, will give RJR Nabisco $450 million in cash which it needs to help pay down its $13.6 billion in long-term debt remaining from a $25 billion leverage buyout in 1988.

RJR Nabisco had previously sold its European food operations, Chun King, Del Monte and some of its bar candy products.

During 1991, the company's core businesses continued a stream of product rollouts even while it pared media advertising. New-product growth has come from Nabisco Biscuit Co., which this July brought out a line of cookies and crackers, SnackWell's and Mr. Phipps, in the healthy segment of the cookie and cracker market. Sales in the segment are expected to hit $500 million by yearend 1993.

Nabisco, which currently holds 44% of the $5.5 billion cookie and cracker market, spent about $50 million in 1991 advertising its various brands of cookies and crackers, down about 38% from more than $80 million in 1990, according to LNA/Arbitron Multi-Media Service.

The entire company spent $285.5 million on media in 1991, down 18.3% from 1990 when media spending dipped 8.7% below prior-year levels, LNA noted.

Nabisco has six of the top 10 selling cookies with Oreo first, Chips Ahoy! second and Fig Newtons third. Ad spending was slashed on a number of its leading brands: Oreo got $8.3 million in media, down 42% from 1990 when it benefited from a major new ad campaign; Chips Ahoy! was down 54.3% to $3.2 million; and Fig Newtons got $4.7 million, down 41.3%.

Last month, R.J. Reynolds Tobacco Co. surprised the magazine and outdoor media by canceling the bulk of its ad spending that would have run in fourth quarter 1992.

RJR spent some $11.9 million in magazines and $12.3 million in outdoor in the fourth quarter of 1991 and a combined $100 million in both for the full year.

The tobacco marketer said part of the funds would be redistributed to consumer point-of-purchase efforts. The company wouldn't say whether it would resume spending levels in the first quarter of 1993.

RJR executives cited the support for a new cigarette, Winston Select, as contributing to the slash in ad spending. Ad costs were high for Select, introduced in May, leaving the company's media budget short of maintaining planned fourth-quarter expenditures.

It was estimated RJR would back Winston Select with more than $35 million in 1992, promoting "a smooth rich flavor unlike any other product." Select is positioned as a separate brand, rather than a line extension, to draw smokers from competing Philip Morris USA brands.

RJR spent an estimated $45 million in media on the Winston line in 1991, according to LNA. A reported $22 million in ads backed Winston's new "flavor seal" packaging, touted as resistant to air and moisture.

HEADQUARTERS

RJR Nabisco/1301 Ave. of the Americas/New York, N.Y. 10019/Phone: (212) 258-5600.

PERSONNEL, BRANDS, AGENCIES

R.J. REYNOLDS TOBACCO CO.: 401 N. Main St./P.O. Box 2959/Winston-Salem, N.C. 27102/Phone: (919) 741-5000. James Schroer, exec vp-mktg/sales; David Iauco, sr vp-mktg.

Winston: FCB/Leber Katz Partners, New York. Robert Hisch, sr exec vp; Ted Littleford, sr exec vp-exec creative dir.

Salem: Trone Advertising, Greensboro, N.C., Lee Trone, pres; Ron Irons, exec vp-creative dir.

Camel: Mezzina Brown, New York. John Mezzina, chmn-exec creative dir; Bill Brown, pres.

Vantage: Robinson & Maites, Chicago. Bill Robinson, Alan Maites, mg partners.

More, NOW: Various agencies on project basis.

Century, Magna, Doral, Sterling: Long, Haymes & Carr, Winston-Salem, N.C. John Barclay, vp-mgmt super.

Sports Marketing Enterprises: Long, Haymes & Carr, Winston-Salem, N.C. Logan McCabe, vp-dir, special events.

R.J. REYNOLDS TOBACCO INTERNATIONAL: 401 N. Main St./P.O. Box 2959/Winston-Salem, N.C. 27102/Phone: (919) 741-5000. J. Brandhorst Jr. vp-mktg; S. Michaelides, dir-mktg, Camel.

Camel, Salem: McCann-Erickson Worldwide, New York. S. Kornberg, sr vp.

Winston: Lintas:Worldwide, New York. Spencer Plavoukos, pres, Lintas:Worldwide.

RJR NABISCO FOODS GRP: 7 Sylvan Way/Parsippany, N.J. 07054/Phone: (201) 682-5000. R. Springer, sr dir-adv svcs; L. Rubinacci, dir-media svcs; B. McMorrow, dir-commercial prodn.

A-1 Steak Sauce, Grey Poupon mustard, Ortega Mexican foods, College Inn: Lowe & Partners, New York. Steve Cooper, sr vp-mgmt super.

NABISCO BISCUIT CO. (RJR Nabisco Foods Group): 100 DeForest Ave./East Hanover, N.J. 07936-1911/Phone: (201) 503-2000. S. Fordham, vp-new bus; F. Myers, sr dir-strategic planning/mkt rsch; J. Myers, sr dir-integrated mktg programs; M. Perry, dir-media svcs; J. Noonan, category bus dir, cookies; E. Shullman, category bus dir, crackers; J. Beumbusch, grp prod mgr, ready-to-eat cereals.

Crackers, margarines, cereals, desserts, dog biscuits: McCann-Erickson Worldwide, New York. Rob McKinley, sr vp-grp dir.

Cookies: FCB/Leber Katz Partners, New York. Colleen Gowl, exec vp-grp mgmt dir; Marc Rappin, sr vp-mgmt dir.; Maureen Sage, sr vp-mgmt dir.

SPECIALTY FOODS DIV (RJR Nabisco Foods Group): 7 Sylvan Way/Parsippany, N.J. 07054/Phone: (201) 682-5000. Daniel Clark, vp-gm; Roger Wagner, sr dir-mktg; Judy Fearing, sr dir-mktg, Charlesanna Ecker, category dir, mktg; Richard Fischetti, sr dir-bus info; Marc Atkinson, dir-trade mktg.

FLEISCHMANN'S DIV (RJR Nabisco Foods Group): 7 Sylvan Way/Parsippany, N.J. 07054/Phone: (201) 682-5000. Douglas Conant, vp-gm; Lynn Ambrosia, dir mktg; Alice Limina, sr dir-planning/bus info.

PLANTERS & LIFE SAVERS DIV (RJR Nabisco Foods Group): 1100 Reynolds Blvd./Winston-Salem, N.C. 27102/Phone: (919) 741-2000. Bruce Wood, pres, Planters & LifeSavers divs; Joseph Collerd, mktg dir; Larry Bumgart, mktg dir; Kathi Mocniak, dir mktg-svcs & planning, LifeSavers div; Don Smith, dir mktg-svcs & planning, Planters div.

Planters nuts and snacks: Lintas:New York. John Barnes, exec vp; Kevin Driscoll, vp-acct super; Phil Balshi; grp creative dir.

Carefree Sugarless Gum, LifeSavers candy, Breath Savers mints, LifeSavers Holes, LifeSavers Sound Savers: FCB/Leber Katz Partners, New York. Bob Hirsch, exec vp; Tony Stanol, mgmt dir; Liz Pava, acct dir; Don Howald, acct dir; Adam Gargani, acct dir.

Bubble Yum, Fruit Stripe Gum: Long, Haymes & Carr, Winston-Salem, N.C. Bob Graham, chief creative officer, Carl Christie, vp-creative dir; Marian Monsen, vp-creative dir; Pete Woods, vp-mgmt super, Wendy Barclay, acct super; LuAn Hobson, acct exec.

RANK: 36

Sara Lee Corp.

Chicago

Ad spending: $273.0 million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	29,090	29,018	0.2
Sunday magazine	3,038	5,179	-41.3
Newspaper	1,545	1,271	21.5
Outdoor	558	208	168.4
Network TV	52,290	74,273	-29.6
Spot TV	16,305	16,969	-3.9
Syndicated TV	13,977	11,508	21.5
Cable TV networks	3,901	3,369	15.8
Network radio	6,385	2,051	211.4
Spot radio	2,441	2,619	-6.8
Measured media	129,529	146,465	-11.6
Unmeasured	143,500	162,200	-11.5
Total	273,029	308,665	-11.5
By top brands	**1991**	**1990**	**% chg**
Hanes hosiery	23,314	12,370	88.5
L'eggs hosiery	20,982	25,545	-17.9
Hillshire Farms meats	12,666	13,715	-7.6
Hanes underclothing	11,955	16,608	-28.0
Sara Lee cakes	8,653	3,630	138.4
Playtex underclothing	6,103	9,083	-32.8
Ball Park meats	6,027	6,936	-13.1
Hanes sportswear	5,974	8,961	-33.3

SALES & EARNINGS ($ in millions)

Worldwide	1992	1991	% chg
Sales	13,243	12,381	7.0
Earnings	761	535	42.2
Division sales	**1992**	**1991**	**% chg**
Packaged meats	4,702	5,124	-8.2
Coffee & grocery	1,919	1,938	-1.0
Personal products	5,398	4,000	35.0
Household, personal care	1,227	1,319	-7.0

CORPORATE PROFILE

Sara Lee Corp. has caught Olympic fever.

Its first Olympic partnership is set for 1994 with the Winter Games in Lillehammer, Norway; a second will be the 1996 centennial Olympics in Atlanta. In both Games it will also sponsor the U.S. Olympic team.

The Hanes division this year broke a $30 million-plus, celebrity-studded campaign themed "Just wait'll we get our Hanes on you" for men's and women's products. Sara Lee's "megabrand" strategy, begun in 1988, promotes multiple products as a single-brand.

The division credits the approach with its growing market share. Hanes had a 29% unit share of the $1.7 billion men's and boy's underwear market at midyear 1992, up 3 points from 1990, according to NPD Group. That was second to Fruit of the Loom's 36% share, down 1 point. Hanes was first with a 15% share in the $1.5 billion women's and girls' underwear market, up 3 points.

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GERMANY'S BUSINESS AND FINANCIAL DAILY

Sara Lee last November completed the buyout of Playtex Apparel, including the Playtex, Cross Your Heart and I Can't Believe It's a Girdle brands, an acquisition valued at nearly $600 million. The marketer also took a 25% stake in Playtex Family Products (Jhirmack and Playtex tampons).

Gary M. Susnjara in April was named to the new Sara Lee corporate post of VP-marketing. He had been ~~president~~-chief operating officer of Saatchi & Saatchi North America before leaving the agency in 1989 to form his own consultancy. Soon after his arrival, Playtex Apparel named Saatchi's New York office to succeed Grey Advertising on the estimated $40 million U.S. and European account.

In July, the marketer tapped Robert S. Fellows, 44, for the new post of director of media. Mr. Fellows, a 15-year veteran of Long, Haymes & Carr, Winston-Salem, N.C., oversees corporate media plans and counsels the various divisions.

Food operations are playing less of a role at Sara Lee with the growth of the other divisions. Kellogg Co.'s Mrs. Smith's Frozen Foods Co. passed Sara Lee for leadership (15.9% to 15.7%) in the $1.1 billion frozen baked goods market for the year ended March 14, according to Nielsen Marketing Research.

The marketer was second in the $1.5 billion frankfurter market in 1991, with a combined share of 17.5% for Hygrade and Kahn's brands, behind Philip Morris Cos.' Oscar Mayer and Louis Rich brands at 20%. Hillshire Farms deli sliced luncheon meats were a distant third at a 5% share in that $2.58 billion market, as its sales fell 6.1% from a year earlier. Philip Morris led with Oscar Mayer (27.3%) and Louis Rich (11.2%), notes Nielsen.

HEADQUARTERS

Sara Lee Corp./3 First National Plaza/Chicago, Ill. 60602-4260/Phone: (312) 726-2600.

PERSONNEL, BRANDS, AGENCIES

SARA LEE MEATS GROUP: 8000 Centerview Parkway, Ste. 300/Cordova, Tenn. 38018/Phone: (901) 756-4051. George Bryan, sr vp-ceo; Andy Alsenas, mgr-mkt.

BIL MAR FOODS (Sara Lee Meats Grp.): 8300 96th Ave./Zeeland, Mich. 49464/Phone: (616) 875-8131. Gary DeWitt, pres-ceo; E. James Weber, vp-sales/mktg, retail div; Steve Michaelson, dir-mktg, retail div.

Bil Mar Foods, Mr. Turkey: Lintas:Campbell-Ewald, Warren, Mich. William Case, sr vp-acct mgmt.

BRYAN FOODS (Sara Lee Meats Grp.): 100 Churchill Road/P.O. Box 1177/West Point, Miss. 39773/Phone: (601) 494-3741. Roger Loeffelbein, pres-ceo; Rick Lowry, vp-mktg, retail.

Bryan Foods: Ogilvy & Mather, Atlanta. Neill Cameron, mg dir.

GALLO SALAME (Sara Lee Meats Grp.): 2411 Baumann Ave./San Lorenzo, Calif. 94580/Phone: (510) 276-1300. Philip M. Francis, pres; Bob McHenry, vp-dir sales/mktg.

Hoffman/Lewis, Oakland, Calif. Fred Whelan, vp-dir client svcs.

HILLSHIRE FARM & KAHN'S (Sara Lee Meats Grp.): 3241 Spring Grove Ave./Cincinnati, Ohio 45225/Phone: (513) 541-4000. William A. Geoppinger, president-ceo; Scott Pursley, vp-consumer mktg; Greg Sykes, vp-retail sales/mktg; Scott Pursley, vp-consumer mktg; Jay Leigeber, dir-mtkg, smoked/semi-dry sausage.

Hillshire Farm meats, Kahn's meats: Lintas:New York. Mat Crisci, exec vp-acct mgr.

HYGRADE FOODS (Sara Lee Meats Grp.): 40 Oak Hallow, Ste. 355/Southfield, Mich. 48034/P.O. Box 19170/Detroit, Mich. 48219/Phone: (313) 355-1100. Rocco Minghine, pres; Margaret Riley, vp/dir-mktg.

Lintas:Campbell-Ewald, Warren, Mich. William Case, sr-vp acct mgmt.

JIMMY DEAN FOODS (Sara Lee Meats Grp.): 8000 Centerview Parkway, Ste. 400/Cordova, Tenn. 38018/Phone: (901) 753-1600. Duane Getty, ceo; Jerry Laner, pres; Ginna Domm, vp-mktg, retail.

Lintas:New York. Mat Crisci, exec vp-acct mgr.

SARA LEE BAKERY: 224 S. Michigan Ave./Chicago, Ill. 60604-2597/Phone: (312) 986-7800. Paul Listig, pres; Richard Seban, dir-mktg.

Lintas:New York. Mat Crisci, exec vp-acct mgr.

[illegible] FOODS: 3709 E. First St./Fort Worth, Texas 76111/Phone: (817) 831-0981. Ronald A. Artzer, pres; Jeff Wayne, vp-sales/mktg; Mike Bonser, vp-mktg.

Block & Nardizzi, Stamford, Conn. Christene Gonzalez, acct super.

PYA/MONARCH: 107 Frederick St./Greenville, S.C. 29607/Phone: (803) 233-9933. Joe B. Pearce, pres-ceo; George T. Watson, vp-mktg/procurement.

Guthrie & Associates, Greenville, S.C. Ray Fedele, vp-acct super.

SUPERIOR COFFEE & FOODS: 990 Supreme Drive/Bensenville, Ill. 60106/Phone: (708) 860-1400. Stanley L. Greanias, pres-ceo; John Hughes, vp-sales/mktg; Mary Kay Buettgen, dir-mktg; Ralph Russo, vp-retail/gourmet.

L'EGGS PRODUCTS: 5660 University Parkway/Winston-Salem, N.C. 27105/Phone: (919) 768-9540. John Piazza, pres-ceo; John Cenevia, vp-mktg.

L'eggs consumer adv: Saatchi & Saatchi Advertising, New York. Marty Gertler, sr vp-mgmt dir.

HANES HOSIERY: 5650 University Parkway/Winston-Salem, N.C. 27105/P.O. Box 2495/Winston-Salem, N.C. 27102/Phone: (919) 744-2011. John Piazza, ceo; Mike Fiatow, pres; Carol Make, vp-mktg; Davi McBride, dir-mktg.

Hanes hosiery: Saatchi & Saatchi Advertising, New York. Lyn Salzberg, sr vp-mgmt dir.

Hanes Fitting Pretty hosiery: Long, Haymes & Carr, Winston-Salem, N.C. Maureen Dunkley, acct exec.

Donna Karan hosiery: Arnell/Bickford Associates, New York. Peter Arnell, Ted Bickford, owners.

Liz Claiborne hosiery: Altschiller Reitzfeld, New York. Jeri Dack, acct mgr.

SARA LEE KNIT PRODUCTS: 450 Hanes Mill Road/Winston-Salem, N.C. 27105/P.O. Box 3019/Winston-Salem, N.C. 27102/Phone: (919) 768-9024. Jim DeRose, pres; Art Gibel, vp-gen mgr/mktg; Lisa Hidepeth, dir-mktg.

Long, Haymes & Carr, Winston-Salem, N.C. Bill Britt, mgmt super-men's wear; Bill LeVasseur, mgmt super-Hanes Her Way/Fitting Pretty; Patrick O'Sullivan, mgmt super, Hanes/Hanes Her Way promos-retail mktg.

CHAMPION PRODUCTS: 3141 Monroe Ave./Rochester, N.Y. 14618/P.O. Box 850/Rochester, N.Y. 14603/Phone: (716) 385-3200. Anne Murry-Randolph, vp-mktg; Polly Allen, vp-merch.

Saatchi & Saatchi Advertising, New York. Michael Donahue, exec mgmt dir.

ADAMS-MILLIS: 1823 Easterchester Drive/High Point, N.C. 27265/P.O. Box 2650/High Point, N.C. 27261/Phone: (919) 887-9200. George Burfeind, ceo; Don Foughi, dir-mktg.

ARIS ISOTONER: 417 Fifth Ave./New York, N.Y. 10016/Phone: (212) 532-8627. Lari Stanton, ceo.

CANADELLE: 4405 Metropolitan Blvd. East/Montreal, Quebec H1R1Z4/Phone: (514) 376-6240. Kenneth Steward, pres; Ramond Nadeau, vp-mktg; David Authier, dir-mktg.

Academie-Ogilvy, Montreal. Ross Cammalleri, grp dir.

COACH LEATHERWARE: 516 W. 34th St./New York, N.Y. 10001/Phone: (212) 594-1850. Lew Frankfort, pres-ceo; John Bernstein, vp-mktg.

Kirshenbaum & Bond, New York. Jon Bond, pres.

KIWI BRANDS: 447 Old Swede Road/Douglassville, Pa. 19518/Phone: (215) 385-3041. Edward L. Collier, pres; Bud P. Drago, vp-mktg.

Kiwi Brands, Ty-D-bol: Foote, Cone & Belding, Philadelphia. Les Altenberg, acct dir.

PLAYTEX APPAREL: 700 Fairfield Ave./P.O. Box 10064/Stamford, Conn. 06904/Phone: (203) 356-8000. Lee Chaden, pres-U.S.; Bob Hall, vp-mktg basic.

Saatchi & Saatchi Advertising, New York. Katalin Kovago, sr vp-mgmt dir; Ericka Witnauer, exec vp-mgmt dir.

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RANK: 56

Schering-Plough Corp.

Madison, N.J.

Ad spending: $198.4 million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	15,658	20,948	-25.3
Sunday magazine	796	20	NA
Newspaper	102	361	-71.9
Outdoor	57	237	-75.8
Network TV	64,927	28,464	128.1
Spot TV	5,507	4,568	21.2
Syndicated TV	4,113	2,863	43.7
Cable TV networks	2,647	1,593	66.1
Network radio	1,374	995	38.1
Spot radio	691	299	131.1
Measured media	95,961	60,357	58.9
Unmeasured	102,500	140,800	-27.2
Total	198,461	201,157	-1.4
By top brands	**1991**	**1990**	**% chg**
Gyne-Lotrimin cream	32,945	0	NA
Drixoral 12 hour cold tablets	10,074	10,879	-7.4
Correctol laxative	8,090	7,828	3.3
Dr. Scholls products	7,913	8,666	-8.7
Tinactin medication	7,011	6,293	11.4
Coppertone sun prods.	6,173	3,002	105.6
Lotrimin athlete's foot cream	5,441	1,972	176.0

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	3,616	3,323	8.8
Earnings	646	565	14.2
U.S.	**1991**	**1990**	**% chg**
Sales	2,116	1,890	12.0
Operating profit	659	572	15.1
Division sales	**1991**	**1990**	**% chg**
Pharmaceuticals	2,895	2,588	11.9
Healthcare products	721	618	16.6

CORPORATE PROFILE

Schering-Plough Corp. in 1991 began reaping the benefits of moving over the counter Lotrimin AF, an athlete's foot treatment, and Gyne-Lotrimin, a preparation for vaginal yeast infections.

Schering-Plough is readying several more ethical drugs for OTC channels and may use its newfound expertise to guide products from other companies through the same channel.

Schering has been preparing to move OTC Carafate, the prescription drug for upset stomach and heartburn made by Marion Merrell Dow. However, a new marketing pact between Marion and SmithKline Beecham may shelve the plans.

Gyne-Lotrimin cream, backed with $32.9 million in media last year, has risen to a 32.2% share of the $286 million category at midyear 1992, second to 57.1% held by Monistat 7 from Johnson & Johnson, according to Towne-Oller & Associates.

Last January, Schering introduced Gyne-Moistrin vaginal moisturizing gel, to relieve vaginal dryness common to menopausal and post-menopausal women.

Lotrimin AF, the leading athlete's foot medication, was backed with $5.4 million in measured media, according to LNA/Arbitron Multi-Media Service. Schering commands much of the footcare market with the Dr. Scholl's line, backed with $7.9 million in media, and Tinactin, an antifungal medication, which got $7 million in media support last year, according to LNA.

In mid-1992, market leader Coppertone broke ads for new Sunless Tanning Extra Moisturizing Lotion, an extension of Coppertone Sunless. The campaign commanded 30% of Coppertone's annual media budget, which totaled $21.8 million in 1991.

Sunless tanning products, which take the seasonality out of the business, make up 10% of the $500 million suncare market. Coppertone holds the top suncare share at 34.6%, far ahead of its nearest competitors, according to Nielsen Marketing Research.

Drixoral cold remedies and Afrin nasal sprays gave Schering 6.2% of the $2.02 billion cough-cold-allergy-sinus market at midyear 1992, according to Towne-Oller & Associates.

Claritin, a once-daily, non-sedating antihistamine already marketed OTC outside the U.S., is pending FDA approval for consumer marketing here.

Correctol, the leading stimulant laxative, got a product extension, Correctol Extra Gentle for women, and media backing of $8 million, same as in 1990.

HEADQUARTERS

Schering-Plough Corp./One Giralda Farms/P.O. Box 1000/Madison, N.J. 07940-1000/Phone: (201) 822-7000

PERSONNEL, BRANDS, AGENCIES

CORPORATE MEDIA BUYING: Schering-Plough Healthcare Prods. Adv. Corp. (in-house); Russell Elliot, pres; Steve Rominee, vp-media.

SCHERING-PLOUGH HEALTHCARE PRODUCTS DIV: 110 Allen Road/Liberty Corner, N.J. 07093/Phone: (908) 604-1640. David E. Collins, pres; Richard Whittaker, sr vp-OTC sales/mktg; Fred Fritz, sr vp-footcare sales/mktg.

Complex 15, Correctol, Dr. Scholl's insoles, Gyne-Lotrimin, Gyne-Moistrin, Lotrimin AF, Solarcaine, Tropical Blend, Water Babies: Cadwell Davis Partners, New York. Elliot Glazer, exec vp-dir, acct svcs.

Afrin, Coppertone, Dr. Scholl's [illegible] Guard, Dr. Scholl's Clear Away, Dr. Scholl's Hidden Comfort, Dr. Scholl's Smooth Touch, Dr. Scholl's corn & callus products: Della Femina, McNamee, New York. Larry Smith, vp-mgmt super; Robert Peterson, vp-mgmt super, Coppertone.

Chlor-Trimeton, Drixoral, [illegible], Tinactin: Warwick Baker & Fiore, New York. Andy Mockler, super-grp acct dir.

[illegible]: William Douglas McAdams, New York. Tony Piaciotta, acct super.

PHARMACEUTICAL OPERATIONS DIV: 2000 Galloping Hill Road/Kenilworth, N.J. 07033/Phone: (908) 298-4000. Raul E. Cesan, pres, Schering Laboratories; Rodolfo Bryce, pres, Schering-Plough Intl; Robert Baldini, sr vp-sales/mktg, Key Pharmaceuticals-Schering Labs; Glenn Horrocks, vp-U.S. mkts/sales, S-P Animal Health; Thomas F. Battaglini, sr dir-mktg, S-P Animal Health; John F. Kopf, dir-mktg svcs, S-P Animal Health; Charles Stroupe, pres, Wesley-Jessen; Robert Cullen, vp-sales/mktg, Wesley-Jessen; Thomas Steiner, sr dir-professional mktg, Wesley-Jessen.

Aquaflex contact lenses, Complements contact lenses, other lens solutions: Young & Rubicam, Chicago. Tim Pretzch, vp-acct super.

Durasoft contact lenses: Foote, Cone & Belding, Chicago. Don Fox, grp acct dir.

RANK: 85

Seagram Co.

Montreal

Ad spending: $126.3 million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	32,779	31,847	2.9
Sunday magazine	1,113	1,396	-20.3
Newspaper	2,880	2,195	31.2
Outdoor	7,834	8,892	-11.9
Network TV	23,915	30,852	-22.5
Spot TV	14,566	13,694	6.4
Syndicated TV	8,280	9,294	-10.9
Cable TV networks	1,229	991	24.1
Network radio	0	779	NA
Spot radio	1,402	674	107.8
Measured media	93,998	100,614	-6.6
Unmeasured	32,300	34,600	-6.6
Total	126,298	135,214	-6.6
By top brands	**1991**	**1990**	**% chg**
Tropicana juices	42,040	42,181	-0.3
Seagram's Canadian	10,866	12,338	-11.9
Seagram wines	7,398	8,186	-9.6
Seagram's gin	5,436	4,049	34.2
Chivas Regal	5,188	5,048	2.8

SALES & EARNINGS ($ in millions)

Worldwide	1992	1991	% chg
Sales	6,345	6,127	3.6
Earnings	727	756	-3.8
U.S.	**1992**	**1991**	**% chg**
Sales	2,876	2,779	3.5
Operating income	80	67	19.4
Division sales	**1992**	**1991**	**% chg**
Spirits & wine	4,941	4,847	1.9
Fruit juices	1,404	1,280	9.7

Seagram Co. has returned its focus to new products, scuttling a strategy in its distilled spirits business that concentrated on premium brands.

That focus proved costly in 1991, when higher excise taxes were placed on liquor; consumers, also worrying about their next paycheck, traded down to lower-price brands.

The diversified beverage company completed the latest in what seems to be a perennial restructuring of its distilled spirits operations. This time, Seagram's spirits and wine group formed the Chivas & Glenlivet Division to manage the worldwide image of its whiskies.

Seagram last year began a global ad campaign for Chivas and plans to give Mumm champagne the global treatment this fall.

Seagram late last year sold seven lower-price liquor brands to rival Jim Beam Brands Co., betting that future growth in distilled spirits would come at the premium end of the market. Earlier divestitures had pared other low-price brands.

That shrank Seagram's dollar share of the retail-sale $9.2 billion U.S. liquor industry to 11.9% from 14.1%, according to Jobson Publishing Corp. Seagram's share of the 147 million cases sold fell to 10% from 13%.

Seagram's total spirits and wine sales for fiscal 1992, ended Jan. 31, rose 1.9% to $4.9 billion as overseas growth offset domestic declines. Sales from Tropicana Products Co. and Seagram Beverage Co., which includes coolers and mixers, rose 9.7% to $1.4 billion.

Media spending on distilled spirits and cooler brands fell 11.2% to $51.9 million in calendar 1991, according to LNA/Arbitron Multi-Media Service.

Nearly all of Seagram's new-product activity has come at the premium end of the market. Seagram added Somers, an imported, citrus-flavor gin, while continuing to test Coyote herb-flavor tequila. Next month it enters Pennsylvania and Florida with Godiva chocolate liqueur in a licensing agreement with Campbell Soup Co.

Tropicana Products added Tropicana Pure Tropics, a line of exotic juice blends, and new flavors to its shelf-stable line of Juice Sparklers.

Seagram Beverage Co., which markets coolers and non-alcoholic beverages, seemed the most aggressive unit. It expanded its test of Taos, a clear wine-based cooler, to include new markets and a new lemon flavor, and also began mar-

Top 25 spot TV advertisers

Rank	Advertiser	Spot TV spending 1991	Spot TV spending 1990	% chg
1	Procter & Gamble Co.	$283.7	$304.1	-6.7
2	PepsiCo	261.4	284.6	-8.2
3	Philip Morris Cos.	206.2	224.9	-8.3
4	General Mills	201.0	191.5	5.0
5	McDonald's Corp.	149.1	146.0	2.1
6	Toyota Motor Corp.	123.9	117.6	5.3
7	General Motors Corp.	109.9	136.5	-19.5
8	Anheuser-Busch Cos.	92.4	91.6	0.9
9	Nissan Motor Co.	85.2	108.2	-21.2
10	Unilever NV	84.3	64.5	30.6
11	Time Warner	80.8	94.5	-14.5
12	Ford Motor Co.	78.4	54.1	44.9
13	Walt Disney Co.	71.9	86.2	-16.7
14	Kellogg Co.	71.4	44.6	60.1
15	Chrysler Corp.	68.1	56.8	19.8
16	Grand Metropolitan	66.8	60.6	10.2
17	American Home Products Corp.	66.4	46.9	41.7
18	Nestle SA	63.9	50.5	26.5
19	Coca-Cola Co.	62.1	75.8	-18.0
20	AT&T Co.	61.7	69.0	-10.5
21	American Stores Co.	56.2	49.1	14.5
22	Circuit City Stores	54.2	50.3	7.9
23	Adolph Coors Co.	53.7	53.7	0.0
24	Dayton Hudson Corp.	52.5	49.0	7.2
25	Hasbro Inc.	52.5	64.8	-19.1

Notes: Dollars are in millions. **Source:** LNA/Arbitron. See Page 72 for methodology.

keting 2-Calorie Quest, a sparkling soft drink aimed at Clearly Canadian. Seagram's Spritzer, a four-flavor line of malt-based coolers, was also launched. Seagram also added iced tea and lemonade flavors to its core Seagram's cooler line and is rapidly converting the full line from wine to malt, which now accounts for half its sales.

Sales of Tropicana refrigerated orange juice (the largest orange juice segment) rose 1.4% to $622.8 million for the year ended March 14, giving it a 32.8% share (up 0.2 point) of the $1.9 billion segment, according to Nielsen Marketing Research. Coca-Cola Cos.' Minute Maid trailed at 22.2% (down 0.5 point). Tropicana's media spending was flat at $42 million, noted LNA.

HEADQUARTERS

Seagram Co./1430 Peel St./Montreal, Quebec H3A 1S9/Canada.

Joseph E. Seagram & Sons/375 Park Ave./New York, N.Y. 10152/Phone: (212) 572-7000.

PERSONNEL, BRANDS, AGENCIES

HOUSE OF SEAGRAM: 800 Third Ave./New York, N.Y. 10022/Phone (212) 572-7000. Thomas K. McInerney, exec vp-mktg; Angelo Vassallo, vp-grp mktg dir, North American whisky grp; Peter Meola, vp-consumer and customer mktg strategy; Judy Sherman, vp-grp mktg dir, scotch/imports grp; Richard McCarthy, vp-grp mktg dir, white goods group.

Boodles gin, Captain Morgan original spiced rum, Chivas Regal, Crown Royal, Leroux cordials, Lord Calvert Canadian, Martell cognac, Myers's rum, Royal Salute, Wyborowa vodka, corporate moderation campaign: DDB Needham Worldwide, New York. Kent DeFelice, exec vp-bus unit head.

Seagram's gin, 7 Crown, Glenlivet, Seagram's V.O., Mount Royal Light: Ogilvy & Mather, New York. Neve Savage, sr vp-exec grp dir.

Jameson premium whiskey, Coyote tequila, Somers gin, Godiva liqueur: Wells Rich Greene BDDP, New York. Mark Abrams, sr vp-acct grp head.

Ethnic adv: The Mingo Group, New York. Samuel Chisholm, pres.

Direct mktg: Most brands: Bronner Slosberg Humphrey, Boston.

Glenlivet: Ogilvy & Mather Direct, New York. Garth Hallberg, sr vp.

SEAGRAM BEVERAGE CO.: 800 Third Ave./New York, N.Y. 10022/Phone: (212) 572-7000. Mark Taxel, exec vp-mktg; Henry Hawley, vp/dir-mktg, beverage-alcohol prods/new prod devel; Marshall Hagen, vp-dir mktg and sales, non-alcoholic beverages; Bob O'Dowd, vp-mktg and sales svcs; Vincent Partridge, vp-mdsg.

Seagram coolers, Taos, Seagram's Spritzer, 2-Calorie Quest: Wells Rich Greene BDDP, New York. Fred Reffsin, sr vp-mgmt super.

SEAGRAM CLASSICS WINE CO.: 2600 Campus Drive, Suite 160/San Mateo, Calif. 94403/Phone: (415) 378-3800. James L. Bareuther, exec vp-sales/mktg; Louis Keyes, vp-mktg.

Sterling Vineyards, The Monterey Vineyard, Mumm Cuvee Napa sparkling wine: Mandlebaum Mooney Ashley, San Francisco. Michael Goefft, gm.

Champagne Mumm: DDB Needham Worldwide, New York. Kent DeFelice, exec vp-bus unit head.

SEAGRAM CHATEAU & ESTATE WINES CO.: 375 Park Ave./New York, N.Y. 10152/Phone: (212) 572-7000. John W. Laird, exec vp-sales/mktg; Nancy Rugus, vp-mktg.

Perrier-Jouet champagne: Frankfurt Gips Balkind, New York. (project basis). Pat Baird, acct dir.

Sandeman port and sherry, Bodegas Torres wines: In-house.

TROPICANA PRODUCTS CO.: 1001 13th Ave. E./Bradenton, Fla. 34208/Phone: (813) 747-4461. Myron Roeder, pres-intl and global mktg; Michael Corcoran, vp-mktg, juice prods; Robert Berger, vp & dir-new prods.

Tropicana orange juice, Homestyle orange juice, Pure Premium orange juice, Pure Premium Homestyle orange juice; Tropicana Twister; Tropicana Twister Light; Tropicana Pure Tropics; Tropicana grapefruit juice, ruby-red grapefruit juice, apple juice, lemonade, fruit punch: Leo Burnett USA, Chicago. Neil Lichtman, sr vp-acct dir.

Tropicana Juice Sparkler: DDB Needham Worldwide, New York. Kent DeFelice, exec vp.

RANK: 4

Sears, Roebuck & Co.

Chicago

Ad spending: **$1,179.4** million

U.S. AD SPENDING ($ in thousands)			
By media	**1991**	**1990**	**% chg**
Magazine	21,583	31,233	-30.9
Sunday magazine	1,705	5,921	-71.2
Newspaper	88,675	136,796	-35.2
Outdoor	416	1,072	-61.2
Network TV	187,875	253,824	-26.0
Spot TV	37,430	37,517	-0.2
Syndicated TV	26,044	13,623	91.2
Cable TV networks	20,322	19,768	2.8
Network radio	66,475	71,253	-6.7
Spot radio	11,816	20,099	-41.2
Measured media	462,340	591,106	-21.8
Unmeasured	717,100	916,800	-21.8
Total	1,179,440	1,507,906	-21.8
By top brands	**1991**	**1990**	**% chg**
Sears household	140,352	133,064	5.5
Sears misc. mdse.	101,407	161,213	-37.1
Discover credit card	48,619	49,846	-2.5
Sears apparel	24,568	44,003	-44.2
Sears automotive	22,251	32,255	-31.0
Allstate insurance	15,326	16,043	-4.5
Dean Witter Reynolds	14,201	16,777	-15.4
Sears tools	13,592	9,578	41.9
Allstate auto insurance	13,429	28,474	-52.8
Sears batteries	10,878	10,231	6.3

SALES & EARNINGS ($ in millions)			
Worldwide	**1991**	**1990**	**% chg**
Sales	57,242	55,972	2.3
Earnings	1,279	902	41.8
Division sales	**1991**	**1990**	**% chg**
Sears Merchandise Group	31,433	31,986	-1.7
Allstate Insurance Group	19,350	18,199	6.3
Dean Witter Financial Service	4,942	4,607	7.3
Coldwell Banker Real Estate	1,613	1,377	17.1
Corporate, other	226	152	48.7

CORPORATE PROFILE

Sears, Roebuck & Co.'s financial services units are thriving, but its ailing retail unit, Sears Merchandising Group, continues to cast gloom on the company.

With sales lagging 1.7% for the group for the year, speculation has swirled that Sears may consider closing some of its 850 stores or shutting down its struggling catalog unit.

Edward A. Brennan, chairman-ceo, has made dramatic cost cuts in the sector to improve profitability. By the end of this year, Sears will have eliminated 43,150 jobs since August 1990.

Last month, Mr. Brennan named Arthur C. Martinez to head the Merchandise Group as chairman-ceo, a post Mr. Brennan had held for two years in addition to his corporate titles. Mr. Martinez was previously vice chairman at Saks Fifth Avenue.

Media advertising has been less visible, down 21.8% in 1991, according to LNA/Arbitron Multi-Media Service.

In November, Sears adopted a new ad slogan, "You can count on me," created by longtime agency Ogilvy & Mather, Chicago. But customers found they couldn't count on Sears last July when the company was accused of overcharging customers at its auto service centers in California. Similar allegations were also made in New Jersey and Florida.

Mr. Brennan responded with a TV and print campaign apologizing for the problem and announcing a new compensation policy for its auto centers, aimed at ending the abuse.

To improve its media-buying efficiency, the company shifted about $50 million in spot TV and radio buying assignments to Focus Media, Los Angeles; O&M retains the estimated $200 million network TV and radio buying duties.

Hoping to stimulate sales in its lumbering $4 billion catalog unit, Sears added MasterCard and Visa credit card payment options for catalog purchases this year, plus direct delivery of mailable merchandise to consumers. Retail stores continue to accept only Sears' private charge card and its Discover credit card.

Outstanding cards grew to 41.2 million for Discover, up 9%; merchant acceptance outlets increased 15.2% to 1.43 million.

HEADQUARTERS

Sears, Roebuck & Co./Sears Tower/Dept. 727, 26th Floor/Chicago, Ill. 60684/Phone: (312) 875-2500.

PERSONNEL, BRANDS, AGENCIES

SEARS MERCHANDISE GROUP: 3333 S. Beverly Road/Hoffman Estates, Ill. 60179/Phone: (708) 286-2500. Arthur C. Martinez, chmn and ceo; Forrest R. Haselton, pres-retail; Alfred G. Goldstein, pres-Sears specialty merch; Charles R. Reaves, pres-Sears logistics svcs; G. Joseph Reddington, pres-ceo, Sears Canada; Thurmond Williams, pres-Sears Mexican Corp.; Allan B. Stewart, sr exec vp-retail stores operations; Russell S. Davis, sr vp-cfo; Matthew A. Howard, sr vp-mktg, buying svcs; Ralph Hoch, natl mgr, retail adv and visual merch; Peter R. Fisher, exec vp-credit; Paul A. Baffico, vp-prod svcs; Albert F. Dombrowski, vp-automotive; Robert J. Ferkenhoff, vp-info svcs; Warren E. Flick, vp-men's & children's apparel; Fred Rosenberg, vp-facilities planning; Martin E. Hanaka, vp-home appliances & electronics; Richard T. Quinn, vp-quality; Eric D. Saunders, vp-home fashions; Marvin M. Stern, vp-home improvement.

Black consumer adv: Vince Cullers Advertising, Chicago. Jeffrey Cullers, mgmt super.

Hispanic adv: Mendoza, Dillon & Asociados, Newport Beach, Calif. Randy Randsom, sr acct exec.

Sears Merchandise Group: Ogilvy & Mather, Chicago. William McCarthy, exec vp-retail svcs.

Sales Promotion: Ogilvy & Mather, Chicago. Austin McGhie, sr vp-genl mgr.

Sears Business Centers: Barkley & Evergreen, Shawnee Mission, Kan. Mark Pfefferkorn, vp-mgmt super.

WESTERN AUTO SUPPLY CO.: 2107 Grand Ave./Kansas City, Mo. 64108/Phone: (816) 346-4000. John T. Lundegard, chmn and ceo; John Leach, pres and coo.

Western Auto Supply: Barkley & Evergreen, Shawnee Mission, Kan. Jeff Fromm, acct super.

Auto America (retail venture of Western Auto Supply): Barkley & Evergreen, Shawnee Mission, Kan. Bob Moore, mgmt super.

Tire America: Barkley & Evergreen, Shawnee Mission, Kan. Jeff Fromm, acct super.

National Tire Wholesale: Barkley & Evergreen, Shawnee Mission, Kan. Angela Milton, acct super.

ALLSTATE INSURANCE GROUP: Allstate Plaza North/2775 Sanders Road/Northbrook, Ill. 60062/Phone: 708-402-5000. John J. Flieder, vp-prod adv; Marshall Antonio, asst vp-corp adv; Ken Zarzynski, prod adv dir; Cynthia Farrow-Miller, Ginny Clark, prod adv mgrs; Darryl Reynolds, project mgr.

Insurance (auto, homeowners, life), **Allstate Motor Club:** Leo Burnett USA, Chicago. Ron Sims, sr vp-acct dir.

DEAN WITTER FINANCIAL SVCS GRP: 2500 Lake Cook Road/Riverwoods, Ill. 60015/Phone: (708) 405-0900. Richard F. Powers, exec vp-dir mktg; William Walsh, first vp-grp adv dir; William Hodges, sr vp-mktg officer, Discover Card; Arthur Barmash, dir-grp adv/mktg comms, Discover Card.

Dean Witter brokerage-dealer: Leo Burnett USA, Chicago. Peter Metz, vp-acct dir.

Discover Card: DDB Needham Worldwide, Chicago. Ray Gillette, grp acct dir.

COLDWELL BANKER REAL ESTATE GROUP: 27271 Las Rambias/Mission Viejo, Calif. 92691/Phone: (714) 367-1800. Kristine Sandrick, vp-corp mktg, Homart Development Co. and Coldwell Banker Residential Grp; G. Lane Barnett, first vp-dir prod devel/mktg, Coldwell Banker Residential Grp; Sondra Byrnes, first vp-primary mktg, Sears Mortgage Corp.

Coldwell Banker (residential): Grey Advertising, Los Angeles. Steve Blamer, sr vp-mgmt super.

RANK: 51

SmithKline Beecham

London

Ad spending: **$208.3** million

U.S. AD SPENDING ($ in thousands)			
By media	**1991**	**1990**	**% chg**
Magazine	1,983	2,884	-31.2
Sunday magazine	0	96	NA
Newspaper	43	96	-54.8
Outdoor	2	0	NA
Network TV	56,538	73,153	-22.7
Spot TV	2,888	5,132	-43.7
Syndicated TV	16,783	14,149	18.6
Cable TV networks	3,481	4,746	-26.6
Network radio	1,287	1,451	-11.3
Spot radio	342	608	-43.8
Measured media	83,346	102,315	-18.5
Unmeasured	125,000	88,900	40.6
Total	208,346	191,215	9.0
By top brands	**1991**	**1990**	**% chg**
Tums antacid	13,291	13,048	1.9
Aqua-Fresh toothpaste	13,237	21,671	-38.9
Contac cold products	12,892	12,748	1.1
Massengill douche	8,581	9,352	-8.2
Oxy medicated products	8,366	7,556	10.7
N'ice	6,412	6,472	-0.9
Sucrets	5,897	6,438	-8.4

SALES & EARNINGS ($ in millions)			
Worldwide	**1991**	**1990**	**% chg**
Sales	8,325	7,961	4.6
Earnings	711	1,116	-36.3
U.S.	**1991**	**1990**	**% chg**
Sales	4,850	5,013	-3.1
Net income	747	743	0.5
Division sales	**1991**	**1990**	**% chg**
Pharmaceuticals	4,389	4,204	4.4
Consumer brands	2,413	2,374	1.7
Clinical labs	958	840	14.0
Animal health	565	543	4.1

CORPORATE PROFILE

SmithKline Beecham last month announced it was combining its U.S. over-the-counter pharmaceutical brands into a partnership with Dow Chemical's Marion Merrell Dow.

The pact combines an operation that had 1991 sales of $550 million with Marion's $119 million. The partnership, 90% owned by SmithKline, will market such brands as SmithKline's Tums, Contac, Oxy and Aqua-Fresh and Marion's Gaviscon, Cepacol, Citrucel and Os-Cal.

The new company initially will be called SmithKline Beecham Consumer Brands and will be headed by SmithKline U.S. Consumer Brands President John Ziegler.

The partnership capitalizes on the growing trend toward self-medication and provides both companies with a much needed pipeline of future pharmaceutical products. No ad agency changes have been announced.

SmithKline is devoting more of its attention to the higher-margin proprietary and OTC pharmaceutical businesses. It is seeking to sell Brylcreem and Silver Cream, Pure & Simple skincare line and some brands of shampoo.

SmithKline's consumer brands achieved sales growth in 1991 despite the recession, thin inventories carried by retailers and stiff competitive activities in prime product categories.

Tums, backed with more than $13 million in media, according to LNA/Arbitron Multi-Media Service, maintained its position as the second-leading antacid in the $762.7 million market with a 15.1% share, behind Johnson & Johnson's Mylanta, at 20.6%, according to Towne-Oller & Associates.

The Aqua-Fresh line of toothpastes and toothbrushes was supported with $13.2 million in media spending in 1991, down 62%. In October, Aqua-Fresh Flex toothbrush entered the market.

Aqua-Fresh held a 13% share of the $1.1 billion toothpaste market by yearend. However, new baking soda toothpastes from competitors had pushed the share down to 9.5% by June 1992, according to Towne-Oller.

In the $2.02 billion cough-cold-allergy-sinus market, SmithKline introduced Contac Day & Night caplets in 1991, supporting the line with $13 million in media. Contac maintained its 4% market share, seventh in the market, according to a Towne-Oller.

The Sucrets line, backed by about $6 million in media, added "vapor" flavors to its line of sore-throat lozenges.

The Oxy line of acne medications remained the second-leading acne remedy, with a 23.4% share of the $247.7 million market, according to Towne-Oller. The company placed much of Oxy's $8.4 million media emphasis in '91 on spots that aired during Fox Broadcasting Co.'s hit "Beverly Hills, 90210."

SmithKline's Massengill kept its position as the No. 1 feminine douche, at a 52% share, as media support fell 8.2% to $8.6 million.

The company is seeking to lessen its dependence on Tagamet, a peptic ulcer therapy with sales in excess of $1 billion worldwide in 1991. Tagamet loses patent protection in the U.S. in 1994.

HEADQUARTERS

SmithKline Beecham/New Horizon Court/Great West Road/ Brentford, Middlesex TW8 9EP/England.

SmithKline Beecham/1 Franklin Plaza/P.O. Box 7929/Philadelphia, Pa. 19101/Phone: (215) 751-4000.

PERSONNEL, BRANDS, AGENCIES

SMITHKLINE BEECHAM PHARMACEUTICAL: 1 Franklin Plaza/P.O. Box 7929/Philadelphia, Pa. 19101-7929/Phone: (215) 751-4000. Jean-Pierre Garnier, pres-N. Amer.; Angeris N. Karabelas, vp-mktg.

Augmentin: Gross Townsend Frank Hoffman, New York. Art Chavez, acct super.

Engerix-B, Tagamet: STN, Rutherford, N.J. Barbara Falco, vp-acct super.

Eminase, Relafen, Timentin: Frank J. Corbett Inc., Chicago. John Burns, exec vp.

Ancef, Tazicef: Ted Thomas Associates, Philadelphia. Don Phillips, sr vp.

Amoxil, Compazine, Bactroban: In-house.

SMITHKLINE BEECHAM CONSUMER BRANDS U.S.: 100 Beecham Drive/Pittsburgh, Pa. 15205/P.O. Box 1467/Pittsburgh, Pa 15230/Phone: (412) 928-1000. Harry Groome, chmn; John Ziegler, pres.; Gordon J. McLaren, vp-dir. mktg; Timothy R. Wright, vp-personal care; Paul J. Fraioli, vp-healthcare; Douglas B. Cox, vp-mktg svcs; Maurice L. Kelley, vp-dir, public affairs; Warren C. Siddall, dir-media.

Aqua-Fresh, Contact, Geritol, Massengill, Sucrets, Vivarin: Grey Advertising, New York. Bill Duggan, vp-mgmt super, Aqua-Fresh; Allison Bailey, vp-mgmt super, Massengill; Tony Thurston, vp-grp mgmt super, Geritol/Vivarin; Christy Graf, vp-mgmt super, Sucrets; Michael Johnson, vp-mgmt super, Contac.

Lectric Shave, N'ice, Sominex, Nature's Remedy: Ogilvy & Mather, New York. Neve Savage, sr vp-group dir.

Ecotrin, Orafix, Oxy, Tums: Jordan, McGrath, Case & Taylor, New York. Ellen Fields, vp-mgmt super, Tums/Ecotrim; Kathryn Ryan, vp-mgmt super, Oxy/Orafix.

A-200: Carrafiello-Diehl & Associates, Irvington, N.Y. Kate McNamara, acct exec.

RANK: 25

Sony Corp.

Tokyo

Ad spending: **$438.6** million

U.S. AD SPENDING ($ in thousands)			
By media	**1991**	**1990**	**% chg**
Magazine	55,451	53,700	3.3
Sunday magazine	38,412	26,330	45.9
Newspaper	29,724	36,103	-17.7
Outdoor	378	340	11.1
Network TV	65,630	63,511	3.3

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By media	**1991**	**1990**	**% chg**
Spot TV	39,965	42,948	-6.9
Syndicated TV	21,534	11,547	86.5
Cable TV networks	8,430	9,727	-13.3
Network radio	1,042	1,041	0.1
Spot radio	2,283	1,686	35.4
Measured media	262,848	246,932	6.4
Unmeasured	175,800	165,200	6.4
Total	438,648	412,132	6.4
By top brands	**1991**	**1990**	**% chg**
Tri-Star Pictures	64,028	66,084	-3.1
Columbia Pictures	56,697	60,187	-5.8
Columbia record & tape clubs	48,356	40,525	19.3
Sony video equipment	26,181	24,647	6.2
Columbia video game club	22,665	7,423	205.4
Sony audio equipment	13,765	9,651	42.6
Sony video cassette tapes	6,755	584	NA
CBS video clubs	6,423	7,319	-12.2

SALES & EARNINGS ($ in millions)

Worldwide	**1992**	**1991**	**% chg**
Sales	28,734	25,649	12.0
Earnings	903	829	8.9
U.S.	**1992**	**1991**	**% chg**
Sales	8,337	7,475	11.5
Division sales	**1992**	**1991**	**% chg**
Video equipment	6,740	6,443	4.6
Audio equipment	7,126	6,254	13.9
Televisions	4,456	3,918	13.7
Other products	4,637	3,847	20.6
Music entertainment	3,299	3,362	-1.9
Filmed entertainment	2,475	1,827	35.5

CORPORATE PROFILE

For Sony Corp.'s U.S. operations, 1991 was a building year in anticipation of a spate of new product introductions slated for later this year and 1993.

With Sony's music and film interests finally integrated into the overall Sony Corp., new products will increasingly leverage the hardware and software assets of these divisions.

For instance, Columbia Pictures and Tri-Star Pictures movies now are available in 8mm, a format Sony pushes in its camcorders and VCRs.

And this coming year, Sony will use Sony Music Entertainment performers in its upcoming MiniDisc format; offer games for Sega of America's game system using Sony Music and Sony Pictures Entertainment characters (though not hardware), and introduce a Sony Wonder brand that combines children's activities from a variety of entertainment units.

Sony is hoping the introduction of its 2-inch MiniDisc, which is able to record and provide much of the sound quality of the compact disc, will revolutionize the portable market the way the CD did 10 years ago. The small size of the MiniDisc makes possible smaller Walkman-type devices.

Sony faces problems in building a market for the MiniDisc. Consumers can't use their current CDs on the new format, and consumers may end up preferring yet another new system, the digital compact cassette (DCC) system that uses existing audiotapes while recording and playing a new kind of tape digitally.

Last year wasn't a good one for consumer electronics hardware sales in the U.S., hurt by price-cutting and lack of new technology. Sony, however, reported an 11.5% increase in U.S. sales for fiscal 1992, fueled by growth in 8mm camcorders, rising to 24.5% of the market from 18%, according to *TV Digest*; its VCRs rose to 4.5% of market from 3.8%. Sony saw its small line of computer products grow 60% in sales.

The growth of the 8mm format finally prompted Matsushita Electric Industrial Co.'s Panasonic Co. to respond with ads titled "Will it play in your VCR?" and that in turn led to a change in ad direction for Sony, to more product-benefit ads.

Sony's introduction of digital audiotape recorders and players proved a disappointment. DAT failed to generate significant interest before the arrival of competing digital compact cassette technology that, unlike DAT, can play existing tapes. DAT wasn't sold in the U.S. because of a copyright battle with musicians. Sony is a software licensee of DCC, a system developed jointly by Philips NV and Matsushita.

Sony's film and music divisions (both part of Sony Software) did well in sales. Boosted by "Terminator 2: Judgment Day" and "City Slickers," Sony Pictures Entertainment finished atop the 1991 box office with a 20% share, according to *Variety*. Sony Pictures named Mark Canton to replace Frank Price as head of Columbia Pictures.

On the TV side, where Columbia Television and Merv Griffin Productions hits included "Married . . . With Children" and "Designing Women," Sony started Tri-Star Television. It named former Paramount executive Mel Harris to a top corporate TV post to boost syndication.

Sony ad figures in this report include the more than $50 million in media spending for Columbia House, which was Sony's but now is a 50/50 joint venture with Time Warner. Columbia House last year began its first TV image campaign.

HEADQUARTERS

Sony Corp./P.O. Box 5100/Tokyo International/Tokyo 100-31/Japan.

Sony USA Corp./9 W. 57th St./New York, N.Y. 10019-2791/Phone: (212) 371-5800.

PERSONNEL, BRANDS, AGENCIES

SONY CORP. OF AMERICA (U.S. Electronics Grp.): Sony Drive/Park Ridge, N.J. 07656/Phone (201) 930-1000. Jeffrey Brooks, sr vp-corp adv/mktg svcs. Sony Consumer Prods: Richard Johnson, dir-consumer adv; Terry Kern, adv mgr-TV prods; Ron Greitzer, adv mgr-video prods; John Heenan, natl adv mgr-audio prods; Janice Breithaupt, adv mgr-personal audio prods. Bus & Prof Grp: Scott Westover, dir-adv. Components & Computer Prods Grp: Carol Byrum, mgr-mktg comms.

Sony Consumer Products: Leo Burnett USA, Chicago. Brian Williams, sr vp-acct dir.

Sony Business & Professional products: Hill, Holliday, Connors, Cosmopulos, Boston. Terry Carleton, sr vp-grp dir.

Sony Components Peripheral Products Co.: Winkler McManus, San Francisco. Jeff Kahn, acct exec.

Sony Corp. of America-media: Geer, DuBois, New York. Allen Ginsberg, sr vp-acct dir.

SONY RECORDING MEDIA OF AMERICA (U.S. Electronics Grp.): 2 Van Riper Road/Montvale, N.J. 07645/Phone: (201) 930-1000.

Sony Consumer Tape, Professional Media, Optical Media: Burkhardt & Christy, New York. Joel Fineman, sr vp-acct dir.

SONY PICTURES ENTERTAINMENT (Sony Software Corp.): 10202 W. Washington Blvd./Culver City, Calif. 90232/Phone: (310) 280-8000. Bob Basso, vp-adv. Tri-Star Pictures: Buffy Shutt, pres-mktg; Kathy Jones, exec vp-mktg; Bill Loper, sr vp-adv. Columbia Pictures: Sid Ganis, pres-mktg. Columbia Tri-Star Home Video: Bill Perrault, vp-domestic mktg; Amanda Karr, asst adv mgr. Loew's Theaters Management Corp.: Susan Fraine, vp-adv/publicity.

Tri-Star Pictures, Columbia Pictures, Columbia Tri-Star Home Video: McCann-Erickson Worldwide, Los Angeles. C. Lodinger, sr vp-mgmt super.

Loew's Theaters: Allied Advertising Agency, Boston/New York/Syracuse/Cincinnati. AM Entertainment, New York. Sherman Wolf Advertising, Chicago.

SONY MUSIC ENTERTAINMENT (Sony Software Corp.): (mailroom) 666 Fifth Ave./New York, N.Y. 10103/P.O. Box 4450/New York, N.Y. 10101-4450/Phone: (212) 445-4321. Tom McGuinness, sr vp-mktg, Sony Music Distribution; Yvonne Ericson, dir-media adv; Arnold Levine, sr vp-creative svcs; Carolee Shepard, vp-adv/design. Columbia Records: Jay Krugman, vp-mktg, East Coast; Diarmuid Quinn, vp-mktg, West Coast. Epic Records: John Doelp, vp-mktg; Dan Beck, vp-prod devel; Steve Einczig, vp-mktg, West Coast. Sony Classical: Laraine Perri, vp-prod mktg. Chaos: Jim Cawley, label mgr.

Columbia Records, Epic Records, Sony Classical, Sony Kids Music, Soho Square, Chaos: In-house.

SONY ELECTRONIC PUBLISHING (Sony Software Corp.): Peter Dille, dir-mktg comms.

Sony Imagesoft and Sony Electronic Publishing: CN Communications, Rahway, N.J.; Brad Manier, vp-creative dir.

COLUMBIA HOUSE CO.: (joint venture of Sony Software Corp. and Time-Warner Corp.): 666 Fifth Ave./New York, N.Y. 10103/P.O. Box 4450/New York, N.Y. 10101-4450/Phone: (212) 445-8540. Sharon Kuroki, sr vp-mktg, music mktg; Brian Wood, sr vp-Columbia House video; Richard Capassela, vp-adv, video club; Harry Elias, vp-Columbia House video library; Linda Andersen, vp-music club adv.

Columbia House, Columbia House Video Club, Columbia House Video Library, Columbia House Music Club, Columbia House Music Collection: Wunderman Worldwide, New York. Peter Rabar, mg supergrp dir.

Top 25 cable TV advertisers

		Cable TV network spending		
Rank	**Advertiser**	**1991**	**1990**	**% chg**
1	Procter & Gamble Co.	$67.8	$57.9	17.1
2	General Motors Corp.	32.4	26.0	24.6
3	General Mills	31.8	27.4	16.1
4	Anheuser-Busch Cos.	31.4	26.8	17.2
5	Time Warner	29.3	51.2	-42.8
6	Philip Morris Cos.	24.1	26.6	-9.5
7	Sears, Roebuck & Co.	20.3	19.8	2.8
8	AT&T Co.	19.3	15.3	26.3
9	Eastman Kodak Co.	19.1	12.6	51.7
10	American Home Products Corp.	19.1	10.8	76.3
11	RJR Nabisco	17.8	21.7	-17.9
12	Mars Inc.	16.6	10.4	59.5
13	McDonald's Corp.	16.2	8.8	84.5
14	Hasbro Inc.	15.6	11.3	38.0
15	PepsiCo	15.1	13.1	15.2
16	Ford Motor Co.	14.0	9.4	49.8
17	Wm. Wrigley Jr. Co.	13.9	10.2	36.3
18	Chrysler Corp.	12.9	9.2	39.7
19	Levi Strauss & Co.	12.5	12.7	-1.5
20	Grand Metropolitan	11.6	10.3	12.2
21	Ralston Purina Co.	10.7	7.6	40.3
22	Nestle SA	10.4	8.5	22.0
23	Kellogg Co.	9.5	3.6	167.1
24	Johnson & Johnson	9.5	8.3	14.4
25	Clorox Co.	9.0	10.8	-16.7

Notes: Dollars are in millions. **Source:** LNA/Arbitron. See Page 72 for methodology.

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Lasts 3-5 Days
HOTTEST NEW PRODUCT
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Nation'sBusiness
The Small Business Adviser

SOURCES: MAGAZINES' CURRENT SUBSCRIBER STUDIES 1990. ABC PUBLISHER'S STATEMENTS.

RANK: 76

Sprint Corp.

Shawnee Mission, Kan.
Ad spending: **$131.4** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	3,142	2,766	13.6
Newspaper	543	79	589.5
Outdoor	77	161	-52.4
Network TV	39,550	63,343	-37.6
Spot TV	15,889	7,515	111.4
Syndicated TV	8,708	5,663	53.8
Cable TV networks	769	1,478	-48.0
Network radio	0	216	NA
Spot radio	109	122	-10.9
Measured media	68,786	81,342	-15.4
Unmeasured	62,600	74,000	-15.4
Total	131,386	155,342	-15.4

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	8,780	8,345	5.2
Earnings	368	309	19.0
Division sales	**1991**	**1990**	**% chg**
Long distance	5,388	5,065	6.4
Local communications	2,812	2,710	3.8
Complementary businesses	826	807	2.3

CORPORATE PROFILE

Sprint Corp., the nation's No. 3 long-distance carrier, may be losing its way in the business, industry analysts say.

Sprint lost another share point to finish at 9% of the $56 billion market in 1991. Revenue growth at Sprint, formerly called United Telecommunications, virtually stopped in the fourth quarter, underscoring the gains made by AT&T Co. (68% market share) and MCI Communications Corp. (16%).

"AT&T and MCI have trained their sights on Sprint customers, and Sprint is losing share," said Robert B. Morris III, analyst at Goldman, Sachs & Co.

It took Sprint until June 1992 to launch The Most to counter MCI's Friends & Family. The Most offers customers 20% savings on calls to whomever the customer talks to the most, including international calls, even if the called person is with another long-distance carrier. In the MCI plan, both caller and callee must be MCI customers to benefit from discounts.

The company last April introduced Business Clout, a program that allows small businesses whose phone bills run between $50 and $2,500 a month to bundle with other businesses in their area their use of outbound calling, 800-services and calling card services.

The Sprint Foncard was introduced in April 1991 to enable customers to dial fewer digits to complete a card call, and in October, Sprint began accepting long-distance charges on a customer's Discover credit card. American Express and Visa cards already had been accepted.

Sprint redirected its overall media spending in 1991 by boosting long-distance lines 40% to $42.4 million, according to LNA/Arbitron Multi-Media Service, with the majority of the budget placed on TV spots with presenter Candice Bergen.

Sprint merged this May with Centel Corp., a major provider of local telephone as well as cellular service, only three months after it had bought the remaining 19.9% of itself held by GTE Corp.

HEADQUARTERS

Sprint Corp./2330 Shawnee Mission Parkway/Westwood, Kan. 66205/ Phone: (913) 624-3000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Kathleen Hughes, vp-corp comms-media.

Sprint: William T. Esrey, chairman-ceo; Ronald T. LeMay, pres-coo, long distance; Thomas E. Weigman, chief mktg officer; Jorge L. Rodriguez, vp-adv/mktg comms.

J. Walter Thompson USA, San Francisco. Sherry Paul, sr vp-deputy gm.

RANK: 50

Tandy Corp.

Fort Worth, Texas
Ad spending: **$213.3** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	18,298	13,096	39.7
Sunday magazine	0	117	NA
Newspaper	23,736	40,541	-41.5
Outdoor	8	16	-48.1
Network TV	25,806	21,914	17.8
Spot TV	3,787	2,386	58.7
Syndicated TV	323	1,325	-75.6
Cable TV networks	1,908	722	164.1
Network radio	4,582	5,761	-20.5
Spot radio	527	300	75.7
Measured media	78,974	86,178	-8.4
Unmeasured	134,300	146,500	-8.3
Total	213,274	232,678	-8.3
By top brands	**1991**	**1990**	**% chg**
Radio Shack electronics	46,518	51,743	-10.1
Tandy computers	12,156	18,729	-35.1
McDuff appliance stores	8,658	8,978	-3.6
Memorex audio & video	5,457	NA	NA

SALES & EARNINGS ($ in millions)

Worldwide	1992	1991	% chg
Sales	4,680	4,562	2.6
Earnings	184	195	-5.9

CORPORATE PROFILE

Tandy Corp., the consumer electronics and computer manufacturer and retailer, is looking beyond its 7,000 Radio Shack stores to invest in new retail concepts. In the process, Tandy is positioning its own products alongside other well-known name brands.

This fall, Tandy will unveil in two markets Incredible Universe, a 100,000-square-foot electronics/appliances/computer superstore that will carry Tandy as well as other names.

Incredible Universe is the company's third retailing concept introduced in the past two years. Computer City, which opened its first store in fall 1991, will expand to 13 computer superstores by the end of this year and 100 by 1995. The Edge in Electronics, which was introduced in fall 1990, will have 16 mall-based electronics stores by yearend.

Tandy continues to expand its 400 McDuff and VideoConcept mall-based, audio and video stores, as well as its McDuff SuperCenters, which feature consumer electronics and major appliances.

Radio Shack, Tandy's main retail chain, was less inclusive in its brand coverage. It discontinued a test of name-brand gift items in its 750 highest-traffic stores and a test of name-brand consumer electronics and appliances at rural stores.

Radio Shack has modified its advertising. Instead of featuring a hodgepodge of consumer electronics items in its monthly fliers, the chain is focusing each flier on a best-selling category, such as batteries, computers, personal electronics, scanners or telephones.

Also, Radio Shack continues to be a more aggressive database marketer by tracking consumer-buying histories and then running customized mailers to potential buyers each month.

Tandy and its GRiD Systems Corp. held a 2.9% share of the $68.9 billion microcomputer market last year, said InfoCorp, up from 2.7% in 1990, allowing Tandy to keep its No. 5 position.

Tandy will introduce later this year a DCC (digital compact cassette) player-recorder and tape, and is teaming up with Casio Computer Co. to manufacture, market and distribute a new family of personal information processors for the emerging hand-held portable information devices market.

Tandy cut media spending by 8.4% to $79 million in calendar 1991, virtually all from newspapers, according to LNA/Arbitron Multi-Media Service.

Radio Shack got $46 million of the total, down 10.1%. Tandy's Memorex brands got the big increase, up 140% to $7.3 million, as it expanded beyond audio and videotape to Tandy-made camcorders, TVs and VCRs.

HEADQUARTERS

Tandy Corp.-Radio Shack/1800 One Tandy Center/Fort Worth, Texas 76102/Phone: (817) 390-3700.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Howard Elias, vp-computers, Tandy Corp.; David Beckerman, sr vp-mktg svcs, Radio Shack; James Nichols, sr vp-consumer retail operations, Radio Shack; Robert Miller, vp-merch, Radio Shack; John Patterson, sr vp-Tandy Computers/Tandy Electronics; Bruce Walters, pres-GRiD Systems Corp.; Nan Neureither, media dir-Radio Shack Adv. Dept.; Ed Luedtke, adv/media/bus mgr-Tandy Name Brand Retail Group Adv. Dept.; Daniel O'Sullivan, pres-O'Sullivan Industries.

Tandy Corp./Radio Shack: In-house.

GRID SYSTEMS CORP.: 9 Village Circle, Ste 150/Westlake, Texas 76262/Phone: (817) 491-5200. Austin Advertising, San Jose, Calif., Mike Austin, pres.

Tandy Name Brand Retail Group (McDuff and VideoConcept stores): In-house.

Memtek Products (Memorex brand): The Richards Group, Dallas. Rod Underhill, principal.

RANK: 71

Thompson Medical/ Slim-Fast Food Cos.

New York/W. Palm Beach, Fla.
Ad spending: **$137.5** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	8,104	11,270	-28.1
Sunday magazine	1,752	6,552	-73.3
Newspaper	465	592	-21.5
Outdoor	4	18	-78.7
Network TV	71,612	75,530	-5.2
Spot TV	6,929	2,323	198.2
Syndicated TV	8,178	9,901	-17.4
Cable TV networks	5,788	3,764	53.8
Network radio	165	0	NA
Spot radio	84	0	NA
Measured media	103,081	109,950	-6.2
Unmeasured	34,400	23,200	48.3
Total	137,481	133,150	3.3
By top brands	**1991**	**1990**	**% chg**
Ultra Slim-Fast	64,780	81,183	-20.2
Dexatrim diet aids	21,280	14,987	42.0
Cortizone-5 skin cream	5,117	3,922	30.5

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	NA	NA	NA

CORPORATE PROFILE

Slim-Fast Food Co. is quickly becoming a "healthy-food" company rather than just a diet-drink marketer, evidenced by the launch early this year of the Ultra Slim-Fast No-Hunger Diet plan and several new frozen entrees.

Last year, Slim-Fast expanded its marketing dominance in the $275.4 million diet meal replacement section of the reducing aids market to an 88.4% share, according to audited figures from Towne-Oller & Associates for the year ended June 1992.

Slim-Fast Food was spun off from Thompson Medical in early 1991. Both remain under the same family ownership and for the purposes of this report are treated as one company.

Slim-Fast reduced its media spending 19.5% to $66.7 million for all products, and continued to push more than 75% of its budget into TV. The company this year used TV to introduce the No-Hunger Diet plan, which promotes an eating program of meal-replacement shakes, the company's Lite 'N Tasty snacks and a "sensible" dinner, said Debra Wolpov, Slim-Fast Food's manager-advertising and public relations.

The diet will continue to be the company's focus next year, supported with a campaign using both celebrity spokespersons and actual customers. The campaign's tagline is "Ultra Slim-Fast, a healthy way to lose weight."

Several new varieties of Ultra Slim-Fast frozen entrees have been introduced this year, sending Slim-Fast food product spending soaring to $16.4 million in first quarter 1992, according to LNA/Arbitron Multi-Media Service. That compares with $5.9 million for all of 1991.

Also introduced in 1992: Lite 'N Tasty caramel corn, a chocolate-chip Ultra Slim-Fast Crunch bar and a more fiber-heavy product, Ultra Slim-Fast Plus.

Thompson Medical funneled $21.3 million, up 29.6%, into Dexatrim. This was the only significant boost in media spending in the entire market and gave Dexatrim a 57.6% share of the $101.6 million market for reducing aids. Acutrim from Ciba-Geigy is second at 16.2%, according to Towne-Oller audits for the year ended in June 1992.

Dexatrim will continue to be the focus of Thompson's media spending, but that should change slightly in 1993 as more attention is given Tempo antacid, said Jennifer Hyland-Jackson, group product manager. A TV campaign for Tempo was launched last July with the tagline, "Doctor-recommended liquid antacids, in a tablet you can carry in your pocket."

Ad spending for new products Lactogest, a lactose intolerance product, and Silk Solutions lotion will also increase in 1993 when they roll national. Line extensions are in the works for Sportscreme, promoted by pro football's Dan Marino, for Cortizone-5, Cortizone-10 and for Dexatrim.

Thompson took in-house the advertising for Aspercreme, previously handled by Grey Advertising, New York, and for Dexatrim, previously at Saatchi & Saatchi Advertising. Thompson will continue to use the campaigns developed by those agencies and may go back to them eventually, the company said. Grey remains the agency of record for media buying.

HEADQUARTERS

Thompson Medical Co./222 Lakeview Ave., 17th Floor/West Palm Beach, Fla. 33401-6112/Phone: (407) 820-9900.

Slim-Fast Food Co./919 3rd Ave./New York, N.Y. 10022/Phone: (212) 688-4420.

PERSONNEL, BRANDS, AGENCIES

THOMPSON MEDICAL CO.: Greg Shaban, sr vp-sales; Jennifer Hyland-Jackson, grp prod mgr-Arthritis Hot/Aspercreme/Lactogest/NP-27/Silk Solutions/Sportscreme/Tempo/new products; Alison Mann, grp prod mgr-Aqua-Ban/Breathe Free/Cortizone-5/Cortizone-10/Dexatrim/Sleepinal.

Aqua-Ban, Breathe Free, Cortizone-5, Cortizone-10, Lactogest, NP-27, Sportscreme, Sleepinal, Tempo: LCF&L, New York. Robin Koval, executive vice president.

Arthritis Hot, Aspercreme, Dexatrim, Silk Solutions: Creative in-house.

Grey Advertising, New York, is agency of record for media buying. Jeff Stein, exec vp.

SLIM-FAST FOOD CO.: Irwin Simon, vp-mktg; Debra Wolpov, mgr-adv/pr.

Slim-Fast powder, Ultra Slim-Fast powder, Ultra Slim-Fast water-mixable, Ultra Slim-Fast hot cocoa, Ultra Slim-Fast Plus, Ultra Slim-Fast Ready-to-Drink in cans, Ultra Slim-Fast Ready-to-Drink in cartons, Ultra Slim-Fast Nutrition bars, Ultra Slim-Fast Crunch bars, Ultra Slim-Fast pudding, Ultra Slim-Fast Lite 'N Tasty snacks, Ultra Slim-Fast Frozen Entrees: Grey Advertising, New York. Jeff Stein, exec vp; Alda Abbracciamento, vp-mgmt super.

RANK: 16

Time Warner

New York
Ad spending: **$587.5** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	66,817	67,542	-1.1
Sunday magazine	6,568	4,161	57.9
Newspaper	32,736	46,677	-29.9
Outdoor	528	445	18.7
Network TV	63,607	72,000	-11.7
Spot TV	68,782	82,546	-16.7
Syndicated TV	40,289	27,605	45.9
Cable TV networks	29,301	51,245	-42.8
Network radio	1,386	3,129	-55.7
Spot radio	1,294	5,321	-75.7
Measured media	311,308	360,671	-13.7
Unmeasured	276,200	320,000	-13.7
Total	587,508	680,671	-13.7
By top brands	**1991**	**1990**	**% chg**
Warner Bros. pictures	99,450	110,463	-10.0
HBO cable TV	67,511	54,504	23.9
Time-Life books	27,254	45,863	-40.6
Sports Illustrated magazine	21,556	26,550	-18.8
Time-Life video cassettes	14,765	19,505	-24.3
Time-Life audio recordings	9,860	14,200	-30.6
Pay Per View cable TV	8,453	4,101	106.1
Warner home video cassettes	7,152	9,717	-26.4
People magazine	5,113	9,109	-43.9

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	12,021	11,517	4.4
Earnings	(99)	(227)	NA
U.S.	**1991**	**1990**	**% chg**
Sales	8,862	8,550	3.6
Operating income	1,041	1,035	0.6
Division sales	**1991**	**1990**	**% chg**
Publishing	3,021	2,926	3.2
Filmed entertainment	3,065	2,904	5.5
Music	2,960	2,931	1.0
Cable TV	1,935	1,751	10.5
Programming-HBO	1,366	1,266	7.9

CORPORATE PROFILE

The trump card in Time Warner's marketing battles in the coming decade is Time Warner Entertainment Co., a splinter unit the company formed last October to include its Time Warner cable operations, Home Box Office division and Warner Bros. studio.

The unit quickly brought needed investment to the company when Toshiba Corp. and C. Itoh & Co. bought minority positions at $500 million each in TWE. They are not "passive" investors. They hold keys to future growth at TWE: Toshiba produces black boxes that make cable interactive; C. Itoh is a marketing giant in Asia, an area of high potential for Time Warner.

Other strategic investor/partners are being courted such as IBM Corp., which could add computer expertise to the venture and make Time Warner even more of a major factor in the home entertainment center market of the future.

The fact that this non-publishing side

Top 25 syndicated TV advertisers

Rank	Advertiser	Syndicated TV spending 1991	1990	% chg
1	**Philip Morris Cos.**	$135.7	$133.8	1.4
2	**Procter & Gamble Co.**	131.8	119.3	10.5
3	**Warner-Lambert Co.**	65.1	48.4	34.4
4	**Kellogg Co.**	58.4	45.4	28.7
5	**Grand Metropolitan**	42.5	45.8	-7.2
6	**Time Warner**	40.3	27.6	45.9
7	**General Motors Corp.**	38.4	27.6	39.3
8	**Johnson & Johnson**	38.3	33.4	14.6
9	**Unilever NV**	36.9	42.2	-12.5
10	**Nestle SA**	33.1	37.6	-12.1
11	**McDonald's Corp.**	33.0	28.0	17.7
12	**Coca-Cola Co.**	31.9	34.1	-6.4
13	**Hasbro Inc.**	31.8	24.4	30.4
14	**PepsiCo**	29.0	18.0	61.2
15	**Bristol-Myers Squibb Co.**	28.5	32.6	-12.5
16	**Eastman Kodak Co.**	27.8	21.7	28.5
17	**Mars Inc.**	27.4	23.0	19.0
18	**Walt Disney Co.**	26.5	14.6	81.3
19	**Sears, Roebuck & Co.**	26.0	13.6	91.2
20	**Wm. Wrigley Jr. Co.**	25.6	23.3	10.0
21	**Mattel**	24.2	13.8	75.9
22	**Anheuser-Busch Cos.**	23.4	13.7	70.7
23	**RJR Nabisco**	22.1	22.1	-0.0
24	**Sony Corp.**	21.7	11.5	87.8
25	**Nintendo Co.**	20.7	16.2	27.5

Notes: Dollars are in millions. **Source:** LNA/Arbitron. See Page 72 for methodology.

The Miami Herald

Top 25 outdoor advertisers

Rank	Advertiser	Outdoor spending 1991	1990	% chg
1	**Philip Morris Cos.**	$69.7	$77.1	-9.7
2	**RJR Nabisco**	51.7	52.4	-1.2
3	**Loews Corp.**	35.0	39.0	-10.3
4	**B.A.T Industries**	24.3	9.4	158.8
5	**American Brands**	12.4	11.4	8.8
6	**Anheuser-Busch Cos.**	11.6	6.1	91.8
7	**Seagram Co.**	7.7	8.6	-10.2
8	**Grand Metropolitan**	7.7	8.5	-9.2
9	**McDonald's Corp.**	6.9	5.2	34.4
10	**General Motors Corp.**	6.4	4.0	61.3
11	**Guinness**	5.9	6.4	-8.2
12	**BankAmerica Corp.**	5.5	5.7	-2.9
13	**Brown-Forman Co.**	4.4	6.2	-30.1
14	**Hospitality Franchise Systems**	3.5	3.6	-1.7
15	**Matsushita Electric Industrial Co.**	3.3	4.0	-18.2
16	**Bass**	3.3	2.8	16.7
17	**Adolph Coors Co.**	3.2	3.0	4.1
18	**PepsiCo**	2.9	4.9	-40.9
19	**Manor Care**	2.7	2.7	3.0
20	**Levi Strauss & Co.**	2.6	0.1	NA
21	**U.S. West**	2.4	2.1	16.6
22	**Delta Air Lines**	2.2	1.8	20.7
23	**Wells Fargo & Co.**	2.2	2.0	8.3
24	**Allied-Lyons**	2.2	4.6	-51.9
25	**CBS Inc.**	2.2	2.5	-12.4

Notes: Dollars are in millions. **Source:** LNA/Arbitron. See Page 72 for methodology.

of Time Warner was championed by Steven J. Ross, company chairman and co-ceo, played a role in the ouster last February of President and co-ceo N.J. Nicholas Jr. He was replaced by longtime rival Gerald Levin. Messrs. Ross and Nicholas, the latter from the Time Inc. side, frequently clashed over the direction of Time Warner since the merger in 1990, and as a result the two halves of the company weren't meshing. Mr. Levin, one of the principal architects of HBO, was handpicked by Mr. Ross.

Time Warner's financial picture has improved gradually since the buyout. Stock deals and refinancing have helped pay down debt. Earnings, however, stayed in the loss column until the fourth quarter 1991, the first gain. By first half 1992, all divisions—publishing, music, cable, filmed entertainment and Home Box Office—showed operating income gains.

Warner Bros. rose from fifth to first last year with a 14% share of the North American film market, largely from the success of "Robin Hood: Prince of Thieves," the year's second best box-office performer. It received $11.4 million in media support. Also getting strong backing were: "JFK," "Curly Sue" and "Doc Hollywood," each with media ad budgets of about $7 million.

Warner Bros. spent $115 million in media during the year for all movies and videos, according to LNA/Arbitron.

Ad spending to promote HBO pay TV service rose 35.7% to $60.1 million in the wake of flat subscription levels and increased competition from home video and pay-per-view.

Time Warner's publishing division was renamed Time Inc., part of a corporate effort to revive sagging morale in the wake of more than 600 layoffs, a weak ad climate and rumors the division would be spun off. Mr. Levin denies the division will be sold.

Time Inc.'s year-old corporate sales staff restructuring was hampered by infighting that culminated with the appointment of Southern Progress Corp. chief Don Logan as president-chief operating officer of the magazine division and the subsequent departure of S. Christopher Meigher III, president of the New York magazines and an internal critic of the restructuring.

Time was redesigned in March and in July launched a $10 million consumer image campaign—its largest ever—via Fallon McElligott, Minneapolis. The ads carry the theme, "If it's important to you, you'll find it in *Time*."

Sports Illustrated remained the biggest spender on subscription acquisition in 1991, but its budget declined as the company sought to cut back on costly subscription gimmicks like sneaker phones. *SI* spent $20.6 million, mostly on spot and cable TV, down 22% from 1991.

Time-Life Books cut its media budget by 40% to $25 million last year, as did Time-Life videocassettes, down 19.5% to 13.6 million, according to LNA.

HEADQUARTERS

Time Warner/75 Rockefeller Plaza/New York, N.Y. 10019/Phone: (212) 484-8000.

PERSONNEL, BRANDS, AGENCIES

FILMED ENTERTAINMENT, WARNER BROS.: 4000 Warner Blvd./Burbank, Calif. 91522/Phone: (818) 954-6000. Sanford E. Reizenbach, exec vp-mktg/planning; Robert G. Friedman, pres-worldwide theatrical adv/publicity.

Warner Bros. films: Grey Advertising, New York. Alec Gerster, exec vp-media.

CABLE, TIME WARNER CABLE: 300 First Stamford Place/Stamford, Conn. 06902/Phone: (203) 328-0600. Tim Evard, vp-mktg, American Television and Comms. Corp.; Kevin Leddy, sr vp-mktg, Warner Cable Comms.

ATC Corp.: In-house. James Duffy, dir-pr.

HOME BOX OFFICE: 1100 Sixth Ave./New York, N.Y. 10036/Phone: (212) 512-1000.
Denny Wilkinson, sr vp-consumer mktg.

HBO: BBDO Worldwide, New York. Ken Angel; sr vp-mgmt rep.

Cinemax: Direct mktg: Kobs & Draft Advertising, New York. Howard Draft, pres.

TIME INC.: 1271 Ave. of the Americas/New York, N.Y. 10020/Time & Life Bldg./Rockefeller Center/New York, N.Y. 10020/Phone: (212) 522-1212. Reginald K. Brack, Jr., chmn-ceo; Don Logan, pres-coo; Donald M. Elliman, Jr., pres-sales/mktg div; Robert L. Miller, pres-ceo, Time Inc. Ventures; Donald J. Barr; exec vp. *Entertainment Weekly*: Michael J. Klingensmith, publisher; Michael J. Kelly, adv sales dir; Scott L. Kauffman, dir of mktg/devel/promo; John Squires, consumer mktg dir; Dan Osheyak, promo dir. *Fortune*: James B. Hayes, publisher; C. Stuart Arnold, adv sales dir; Leslie Gaines-Ross, mktg dir; Brian D. Wolfe, consumer mktg dir; David L. Nimz, promo dir. *Life*: James Gaines, pub; Cleary Simpson, adv sales dir; Claudia Jepsen, sales development dir; Kate Salavaara, consumer mktg dir; Ripley Odell, promo dir. *Money*: William S. Myers, publisher; Betsy Martin, adv sales dir; Jonathan Bulkeley, mktg dir; Michele M. Jaworski, consumer mktg dir; Michael Rich, promo dir. *People*: Ann S. Moore, publisher; Jim Donoghue, adv sales dir; Penny Sheridan, sales devel dir; Warren Milich, brand devel dir; Jeremy Koch, consumer mktg dir; Hope Hening, promo dir. *Sports Illustrated*: Mark Mulvoy, publisher; Alvaro Saralegui, adv sales dir; Linda Warren, consumer mktg dir. *Sports Illustrated for Kids*: Susan Sachs, publisher; Kathy-Lee Wilcox, sales devel dir; Susan Alexander, mktg dir; Mark Stanich, consumer mktg dir; Pamela T. Dey, promo mgr. *Time*: Lisa Valk, publisher; Edward McCarrick, adv sales dir; Martin Bounds, assoc mktg dir; Ken Godshall, consumer mktg dir; Tim Nix, promo dir.

Entertainment Weekly adv promo: Deutsch Inc., New York. Linda Emmanuel, sr vp.

Fortune adv promo: Ogilvy & Mather, New York. Betsy Lembeck, vp-acct dir.

Life adv promo: Messner Vetere Berger Carey Schmetterer, New York. Tom Messner, partner.

Money adv promo: Mullen Advertising, Wenham, Mass. Bruce Gold, acct super.

People adv promo: Young & Rubicam, New York. Arlene Brickner, sr vp-grp dir.

People consumer mktg: Grey Entertainment Media, New York. Phyllis Howe, vp-mgt super.

Sports Illustrated, Sports Illustrated for Kids adv promo: Ogilvy & Mather, New York. Peter Haines, vp-acct super.

Sports Illustrated consumer mktg: Wunderman Worldwide, New York. Phil Cheevers, sr vp-mgmt super. A. Eicoff & Co., Chicago. Francie Barson, sr vp-media dir.

Time adv promo: Fallon McElligott, Minneapolis. Kathy Sprait, mgmt super.

SUNSET PUBLISHING CORP.: 80 Willow Road/Menlo Park, Calif. 94025/Phone: (415) 321-3600. Robin Wolaner, pres-ceo; David B. Woodward, vp-mktg dir; J. Richard Dyess, vp-adv sales dir, *Sunset*.

Sunset adv promo: Saatchi & Saatchi/Pacific, San Francisco. David Hill, pres-corp comms grp.

SOUTHERN PROGRESS CORP.: 2100 Lakeshore Drive/Birmingham, Ala. 35209/Phone: (205) 877-6000. Jim Nelson, pres-ceo; Tom Angelillo, exec vp. *Cooking Light*: Jeffrey C. Ward, vp-pub; Rick Emerson, promo mgr. *Progressive Farmer*: Ed Dickinson, vp-publisher; W.L. Stradley, mktg svcs dir; Patti Henderson, sales promo mgr. *Southern Accents*: Anthony P. Glaves, vp-publisher; Ashley Carr Smith, promo mgr. *Southern Living*: Scott Shephard, vp-publisher; H.B. Flora, sr vp; Greg Keyes, adv dir; Burton Craige, vp-pub, *Southern Living* Homes Group.

RANK: 12

Toyota Motor Corp.

Toyota City, Japan
Ad spending: **$632.2 million**

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	105,355	77,924	35.2
Sunday magazine	1,852	2,148	-13.8
Newspaper	11,131	12,536	-11.2
Outdoor	1,774	1,275	39.1
Network TV	173,665	170,903	1.6
Spot TV	123,870	117,569	5.3
Syndicated TV	16,514	16,258	1.6
Cable TV networks	8,099	5,804	39.5
Network radio	0	1,013	NA
Spot radio	253	1,093	-76.8
Measured media	442,512	406,545	8.8
Unmeasured	189,700	174,200	8.9
Total	632,212	580,745	8.9
By top brands	**1991**	**1990**	**% chg**
Toyota cars	233,645	212,676	9.9
Lexus cars	125,982	97,886	28.7
Toyota trucks & vans	78,261	89,798	-12.8

SALES & EARNINGS ($ in millions)

Worldwide	1992	1991	% chg
Sales	81,307	71,400	13.9
Earnings	1,903	3,100	-38.6

CORPORATE PROFILE

Toyota Motor Corp., the biggest Japanese auto marketer in the U.S., got sidetracked by the recession. Its plans to sell 1.5 million vehicles a year in the U.S. by mid-decade may take a few more years than planned.

Toyota Motor Sales USA, the parent's sales subsidiary in the U.S., obtained its third consecutive million-plus year for vehicle sales in 1991, though at 1,010,480 it represented a decline of 4.5% from 1990.

The total still elevated Toyota's share of the car and light-truck market to 8.2% from 7.8% because of the decline in overall vehicle sales of 11.3%, according to *Automotive News*. The shares include Lexus' 0.6% in '91 and 0.5% in '90.

At midyear 1992, car and light-truck sales of 460,546 units, up 2.4%, combined with vigorous sales of the luxury Lexus models at 43,769 units, up 54.7%, put Toyota's total market share at 7.8%, up 0.5% at the halfway mark compared the year before. Greater car sales by most car marketers by midyear is the cause of the share slide from yearend.

The popular Camry was Toyota's best seller last year at 263,818 units (U.S.-built and imported). It was the most heavily promoted make with $78 million in media spending, up 59.1%, according to LNA/Arbitron Multi-Media Service. Pickup trucks took $37 million, down 15.9%.

But going into the 1992 model year, Toyota budgeted a massive $120 million in advertising behind the new Camry, the midsize sedan that competes directly with the Honda Accord.

Toyota believes the midsize market will grow from about 3.5 million sales in 1990 to about 4.2 million by 1994. To meet that projection, Toyota has spent $800 million doubling Camry production with a second factory in Georgetown, Ky.

Toyota's Corolla accounted for 1991 sales of 199,083 (both domestic and imported units) and measured media spending estimated at $34 million, up 26%, LNA noted. Introduction of the 1993 Corolla line began in August.

Media expenditures for the five Lexus models totaled $125.4 million, up 28.2%. The top-of-the-line LS400 model once again got most of the budget, nearly $50 million, about the same level as 1990. Lexus unit sales rose 12.1% to 71,206.

HEADQUARTERS

Toyota Motor Sales USA/19001 S. Western Ave./Torrance, Calif. 90509/Phone: (310) 618-4000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Toyota: Yale Gieszl, exec vp-sales/operations; George Borst, vp-strategic prod planning; Renald T. Rooney, corp mktg mgr; Gerald R. Perry, natl adv mgr; John Bucci, natl adv mgr/cars; Don Cecconi, natl adv mgr/trucks; David Pelliccioni, natl merch mgr; Leo Parente, dealer assn adv mgr. Lexus: Donald V. Esmond, corp sales mgr; Robert Neuman, natl mktg mgr; Richard Anderman, natl adv mgr.

Toyota autos & trucks: Saatchi & Saatchi/Pacific, Torrance, Calif. Warren Benjamin, mgmt dir.

Lexus autos: Team One (Saatchi & Saatchi), El Segundo, Calif. Scott Gilbert, exec vp-mgmt dir.

Hispanic adv-Toyota/Lexus: Conill Advertising, Los Angeles. Fabiola Hernandez, vp-clnt svcs dir.

RANK: 93

UAL Corp.

Elk Grove Village, Ill.
Ad spending: **$119.2 million**

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	6,954	8,682	-19.9
Sunday magazine	346	120	188.3
Newspaper	20,736	18,659	11.1
Outdoor	68	5	NA
Network TV	23,842	40,361	-40.9
Spot TV	10,020	8,292	20.8
Syndicated TV	803	148	442.0
Cable TV networks	4,154	1,649	152.0
Network radio	0	985	NA
Spot radio	4,554	5,363	-15.1
Measured media	71,477	84,264	-15.2
Unmeasured	47,700	39,900	19.5
Total	119,177	124,164	-4.0

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	11,663	11,038	5.7
Earnings	(332)	95	NA
Division sales	**1991**	**1990**	**% chg**
Passenger	10,296	9,634	6.9
Cargo	704	593	18.7
Other	663	811	-18.3

CORPORATE PROFILE

UAL Corp.'s United Airlines will finally become a worldwide carrier in February when it launches its first round-the-world service.

The new route underscores United's growing international traffic to Europe, Latin America and the Pacific.

United last year expanded its European service and bought some of the assets of Pan American World Airways to expand into the profitable Central and South America routes.

The European expansion forced British Airways to sever its ties with United. United responded by linking up with a smaller U.K. carrier, British Midland. United also announced an alliance with Air Canada.

In the U.S., United was the nation's No. 2 carrier with an 18.5% share of passenger miles for the 12 months ended in May, compared with 17.2% the year before.

The carrier moved to upgrade both first-class and business-class sections, especially on international service.

First-class passengers now get Dom Perignon champagne, beluga caviar and Godiva chocolates. United also began testing McDonald's Friendly Skies Meals, a promotion offering McDonald's Corp.'s meals in the air. United cut back marketing sponsorships to fund some of the improvements.

The growth hasn't come without problems. A no-holds-barred battle for the leisure traveler has been raging among U.S. air carriers since spring. Cut-rate pricing has delivered more customers but has meant bigger losses.

In 1991, UAL suffered an operating loss of $332 million, which intensified this year as United followed American's lead in reacting to a limited two-for-one sale offered by Northwest Airlines and opened up the half-price sale to everyone. At midyear, UAL had a $187.4 million operating loss, compared with 1991's loss of $104.3 million.

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Already publisher of an airline magazine, United this year announced a High Street Emporium service, in which passengers can order items from catalogs while on board and pick up the items upon arrival.

HEADQUARTERS

UAL Corp./1200 E. Algonquin Road/Elk Grove Village, Ill. 60007/P.O. Box 66100/Chicago, Ill. 60666/Phone: (708) 952-4000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: James M. Guyette, exec vp-mktg & plng; Adam Aaron, sr vp-mktg; John E. Ruhaak, vp-adv/promo; William Alenson, sr staff exec-intl adv; Karen Sheriff, staff exec-domestic adv; Patricia Engels, pres/ceo-Mileage Plus Inc.; Rakesh Gangwal, sr vp-planning.

United Airlines: Leo Burnett USA, Chicago. Jim Thompson, exec vp-client svc dir; Steve Crawford, sr vp-acct dir.

RANK: 15

Unilever NV

London/Rotterdam

Ad spending: **$593.7** million

U.S. AD SPENDING ($ in thousands)

By media	**1991**	**1990**	**% chg**
Magazine	81,027	70,836	14.4
Sunday magazine	338	2,290	-85.3
Newspaper	597	1,101	-45.8
Outdoor	486	716	-32.1
Network TV	154,616	162,862	-5.1
Spot TV	84,301	64,534	30.6
Syndicated TV	36,901	42,155	-12.5
Cable TV networks	8,063	6,740	19.6
Network radio	1,137	2,858	-60.2
Spot radio	3,931	1,819	116.1
Measured media	371,397	355,911	4.4
Unmeasured	222,300	213,000	4.4
Total	593,697	568,911	4.4
By top brands	**1991**	**1990**	**% chg**
Wisk laundry detergents	28,286	17,825	58.7
Ragu sauces	26,890	23,676	13.6
Vaseline creams/lotions	26,308	14,991	75.5
Lever 2000 soap	21,159	6,897	206.8
Lipton tea	20,388	12,391	64.5
Dove soap prods	18,691	15,677	19.2
Shedd's margarine	13,985	13,694	2.1
Promise margarine	13,030	13,707	-4.9
I Can't Believe It's Not Butter!	12,632	15,114	-16.4
Power Stick antiper	12,469	9,417	32.4
Close-Up toothpaste	12,423	15,957	-22.1
Caress soap	11,003	8,927	23.3

SALES & EARNINGS ($ in millions)

Worldwide	**1991**	**1990**	**% chg**
Sales	41,161	39,620	3.9
Earnings	2,049	1,622	26.3
U.S.	**1991**	**1990**	**% chg**
Sales	8,475	8,195	3.4
Operating profit	597	644	-7.3
Division sales	**1991**	**1990**	**% chg**
Food products	21,187	20,465	3.5
Detergents	9,272	8,812	5.2
Personal products	5,017	4,813	4.2
Specialty chemicals	3,184	3,074	3.6
Other operations	2,500	3,048	-18.0

CORPORATE PROFILE

Unilever's Lever Bros. division has sent Procter & Gamble Co. to the showers, besting the vaunted soap marketer in one of its most prized categories—bar soaps.

Lever 2000 skincare soap, introduced in 1990, propelled Unilever past P&G last year in the $930 million bar soap derby, giving Unilever a 32.5% share vs. P&G's 26.7% in supermarkets for the 52-week period ended March 14, 1992, according to Nielsen Marketing Research.

An unscented version of Lever 2000 is now in test to expand the franchise, though P&G is hardly standing still with its phalanx of top soaps.

P&G beat Unilever to market with concentrated liquid detergents such as Cheer, Dash, Era and Tide, all in test. Unilever has since pushed All concentrated liquid into national distribution. P&G leads the $3.6 billion laundry detergent market with a 55.5% total share in the 52-week period ended May 23, 1992, according to Nielsen.

Unilever continues to build its dominant position in the margarine market. Last month, it rolled out Promise Ultra, a 35-calorie-per-serving spread made with canola oil. Earlier this year it spent another estimated $12 million to introduce nationally Move Over Butter. Unilever holds a lofty 37% share of the market. Kraft General Foods is second at 21%, followed by RJR Nabisco at 13%, according to Information Resources Inc.

Unilever spent nearly $40 million in media in 1991 on Shedd's, Promise and I Can't Believe It's Not Butter margarine spreads, according to LNA/Arbitron Multi-Media Service. This blended segment was the fastest-growing in the $1.5 billion margarine market in 1991, with compounded growth totalling 20% over the past three years.

Ragu Foods, recently merged with Van den Bergh Foods, backed Ragu sauces with $26.9 million in media, up 13.6%. The growth in spending primarily came from a $4.8 million expenditure behind new product Ragu Chicken Tonight sauces. The red and white sauces were created to complement chicken dishes.

The launch of Lever 2000 has been so successful that in its second year it has risen to No. 3 in the bar soap market with an 8.5% share, according to Nielsen. The Lever Bros. product, however, has engendered a broad marketing response from P&G.

P&G's newly introduced Whitewater Fresh Zest apes the beveled shape of Lever 2000, and the company has amended formulas and positionings on Zest, Coast and Safeguard. The reformulations make the P&G soaps less harsh and drying, and allow Zest and Safeguard to be positioned as all-around family soaps (like Lever 2000) rather than just deodorant soaps.

Lever 2000 got $21.2 million in media support last year, up from $6.9 million in 1990, its introductory year.

Unilever's Dove brand remained the leading bar soap at 16.3% of the market, though its sales were down 9.6%, according to IRI. Unilever cut Dove soap's media outlays 31.7% to $7.3 million and shuffled it into Dove beauty wash, which rose 80.5% to $8.9 million. Caress, with a 6% share, suffered a 5.1% decline in retail sales even though advertising rose 23.3% to $11 million.

After 35 years, Lever's Wisk liquid detergent was reformulated, giving it properties that enhance its ability to more quickly break up oil and dirt. Wisk liquid drew $17.5 million in media, up 20.7% from 1990.

While Unilever is the top seller of personal products worldwide, it remains second in the U.S. behind P&G, which has been building its skincare, haircare, cosmetics and fragrance businesses through acquisitions.

Last March, Unilever's Chesebrough-Pond's unit restaged the Pond's skincare line with a $30 million marketing campaign. The Pond's brand was repackaged to look more like a cosmetics line and extended into different categories to attract new users. The new line offers Cleansing Lotion & Moisturizer in One, Clarifying Astringent, Foaming Cleanser & Toner in One, Moisturizing Cleansing Bar and Oil Controlling Cleansing Bar.

Pond's is currently the No. 1 facial cleanser in that $500 million market, with a 19% share, industry sources say.

The huge campaign this year certainly revived ad spending behind Pond's. The line only drew $2.2 million in 1991, all on Pond's Water Rinsable Cleanser, down from $9 million in 1990.

Chesebrough-Pond's is priming the ad pump for Vaseline Intensive Care this year with a new campaign carrying a $38 million media price tag out of a total marketing budget of $59 million, according to industry estimates. New spots for the brand have Joan Lunden from ABC-TV's "Good Morning America" delivering news-like "Skin Science Updates."

Vaseline in its varied forms is the leading hand and body lotion comprising 20.6% of the $488.6 million market covering the 12-month period ended June 1992, according to Towne-Oller & Associates' audits of food and drugstores.

Unilever's Thomas J. Lipton Co. and PepsiCo formed the Pepsi/Lipton Tea Partnership last January to market Lipton Original iced tea. The product is to be sold in 16-ounce glass bottles. The $400 million canned and bottled iced tea market is quickly becoming saturated with marketing partnerships: Coca-Cola Co./-Nestle, Source Perrier/Celestial Seasonings and A&W Brands/Tetley.

The partnership with PepsiCo forced a new agency alignment on the $20 million to $30 million tea account. J. Walter Thompson USA, New York, got the business from Lintas:New York, which dropped the account because it handles a PepsiCo rival, Diet Coke. Lintas kept the soup division, however.

HEADQUARTERS

Unilever/P.O. Box 760/3000 DK Rotterdam, Netherlands.

Unilever PLC/Unilever House/P.O. Box 68/London EC4P 4BQ, U.K.

Unilever U.S./390 Park Ave./New York, N.Y. 10022/Phone: (212) 888-1260.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Joseph E. Campion, dir-media; John Lamson, assoc dir-media mgmt grp; Jean Marie Fish, Noreen Simmons, media mgrs; Irene Grieco, magazine super; Jeannine Heller, spot super; Diana Maiocco, network super.

LEVER BROS: 390 Park Ave./New York, N.Y. 10022/Phone: (212) 688-6000. David F. Webb, pres; David B. Sharp, sr vp-mktg; Greg Creed, category mgr-bar soap; William J. Genter, category mgr-laundry detergents; Peter Ryan, category mgr-laundry additives; Marc Rovner, category mgr-hard surface cleaners; Keith D. DeVault, sr vp-sales; Robert Schmitz, mktg rsch dir; Elizabeth C. Crehan, dir-promo svcs; Frank E. Gonda Jr., dir-creative svcs.

All, Snuggle, Shield: Lintas:New York. Irene Little, mgmt super.

Dove, Surf, Final Touch: Ogilvy & Mather, New York. Neve Savage, sr vp-grp dir.

Sunlight, Caress: BBDO Worldwide, New York. Andrew Donchak, exec vp-sr acct dir.

Wisk, Lever 2000: J. Walter Thompson USA, New York. Bill Gross, sr vp-acct dir.

Professional programs, medical: Sudler & Hennessey, New York. Wayne Traub, sr vp.

VAN DEN BERGH FOODS: 2200 Cabot Drive/Lisle, Ill. 60532/Phone: (708) 505-5300. Consumer Prods. Grp: Rajan W. Nagarkar, category mgr; Lynn Johnson, dir-mktg rsch; Myrna F. Schreibman, dir promo devel. Professional Mkts. Grp.: Thomas E. Milligan, sr vp; H. Dennis Smith, dir-comms; James E. Kilponen, vp-gm, foodservice; Arto Puolanne, vp-gm, bakery personnel.

Mrs. Butterworth's syrups, Mrs. Butterworth's pancake & waffle mixes: McCann-Erickson Worldwide, New York. Hank O'Brien, sr vp-grp dir.

Promise, I Can't Believe It's Not Butter!: McCann-Erickson Worldwide, New York. Linda Luca, sr vp-mgmt super.

Shedd's Country Crock spreads, Country Crock cheese products, Mrs. Filbert's margarine & salad products: Stone & Simons, Southfield, Mich. Christopher Gaffield, exec vp.

Imperial margarine: Lintas:New York. Stephanie Becker, sr vp-mgmt super.

Foodservice: Esrock Advertising, Orland Park, Ill. Jack Coughlin, pres.

Bakery-frozen doughs, mixes: The Marlin Co., Springfield, Mo. Dennis Marlin, pres.

Ragu Foods: Arthur P. Gonis, pres-ceo; Michael Bauer, vp-mktg; John M. Gennari, grp prod mgr-spaghetti sauce; Frances Bainor-Ebner, grp prod mgr-Adolph's/Pizza Quick/Chicken Tonight; Sheryl Roth-Rogers, grp prod mgr-new prods; Robert W. Spassard, vp-sales.

Ragu spaghetti sauces, Pizza Quick sauces, Adolph's tenderizers & marinades, Chicken Tonight: J. Walter Thompson USA, New York. Bruce Kelley, sr vp-mgmt dir.

THOMAS J. LIPTON CO.: 800 Sylvan Ave./Englewood Cliffs, N.J. 07632/Phone: (201) 567-8000. Robert A. O. Davidson, sr vp-mktg; Max J. Ballard, sr vp-sales, Gold Bond; John M. Heil, vp-grocery mktg-Lawry's; Richard P. Kundrat, vp-gm, foodservice-bottler & dairy; Angelo S. LaMantia, vp-foods div; Robert S. Livingston, vp-sales div; Richard Newman, vp-mktg, Gold Bond; Stew Krentzman, vp-beverage div; Roy Thompson, gm-foodservice-Lawry's; Bruce Belowich, category dir-soups/meals; Michael Cullen, dir-new products; J. Peter Deeb, dir-trade merch; Linnea Johnson, dir-consumer promo; Tom Keen, dir-new food projects; Stewart Krentzman, vp beverage; Theodore Labiner, dir-adv/consumer svcs; Joseph Russo, dir-mkt rsch; Joseph Scaccia, Daniel Wynne, dirs-prod mgmt-Lawry's; John L. Sullivan, dir-mktg, foodservice.

Lipton teas: J. Walter Thompson USA, New York. Doug McMahon, acct. super.

Lipton soups, side dishes, Wish-Bone salad dressing: Lintas:New York. Nancy Poore, acct super.

Sunkist fruit snacks, Wyler's drink mixes: FCB/Leber Katz Partners, New York. Jill Seligson, vp-acct dir.

Popsicle/Fudgsicle/Creamsicle frozen treats, Mickey's Parade Ice Pops, Mickey Mouse Bars, Gold Bond frozen treats, Minute Maid Fruit Juicee, Nintendo frozen treats, WWR Superstar: McCann-Erickson, Worldwide, New York. L. Luca, sr vp-mgmt rep.

Lawry's Foods: Dailey & Associates, Los Angeles. Brian Morris, exec vp-dir, client svcs.

Food service: Warner, Bicking, Morris & Partners, New York. J.A. Morris, pres-mktg dir.

CHESEBROUGH-POND'S USA: 33 Benedict Place/Greenwich, Conn. 06830/Phone: (203) 661-2000. Peter England, sr vp-mktg/sales; Natalie Danysh, dir-mktg, health; William Ecker, dir-mktg, beauty; Gary Fraser, grp prod mgr-oral hygiene; Linda Nash, grp prod mgr-haircare; Keith Weed, grp prod mgr-deodorant/toiletries; Victor Gaudet, sr vp-sales; William Reynolds, grp prod mgr-facecare; David Cohen, grp product mgr-facecare; Kimberly Doyle, dir-mktg svcs.

Brut deodorant & fragrance, Power Stick deodorant, Aim toothpaste, Pepsodent Professional toothbrush, Impulse body spray, Lone Mystique, Aziza cosmetics, Mentadent Toothpaste: Lintas:New York. Jeff Fine, grp exec vp.

Top 25 magazine advertisers

		Magazine spending		
Rank	**Advertiser**	**1991**	**1990**	**% chg**
1	**General Motors Corp.**	$250.4	$207.2	20.9
2	**Philip Morris Cos.**	215.1	260.0	-17.3
3	**Ford Motor Co.**	149.6	148.1	1.0
4	**Procter & Gamble Co.**	142.9	154.7	-7.6
5	**Chrysler Corp.**	106.7	103.5	3.1
6	**Toyota Motor Corp.**	105.4	77.9	35.2
7	**Grand Metropolitan**	83.3	76.7	8.6
8	**Unilever NV**	81.0	70.8	14.4
9	**Nestle SA**	77.1	69.4	11.1
10	**Time Warner**	66.9	67.6	-1.0
11	**American Brands**	64.3	60.9	5.6
12	**RJR Nabisco**	61.8	78.8	-21.6
13	**Honda Motor Co.**	58.1	61.3	-5.2
14	**Johnson & Johnson**	56.3	28.9	94.9
15	**Sony Corp.**	55.5	53.7	3.3
16	**AT&T Co.**	48.8	65.2	-25.1
17	**Mazda Motor Corp.**	46.4	48.5	-4.4
18	**Bradford Exchange**	45.3	26.6	70.2
19	**Estee Lauder**	42.2	33.5	25.7
20	**Allied-Lyons**	38.8	36.1	7.5
21	**Eastman Kodak Co.**	38.7	44.3	-12.7
22	**General Electric Co.**	36.6	36.7	-0.4
23	**American Protection Industries**	33.8	27.9	21.2
24	**Capital Cities/ABC**	33.7	39.0	-13.4
25	**Seagram Co.**	32.8	31.8	2.9

Notes: Dollars are in millions. **Source:** LNA/Arbitron. See Page 72 for methodology.

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To understand the success of recent circulation-building promotions and ad page increasing programs, *Advertising Age* is publishing a Special Report: Magazines. It will explore why certain categories like automotive, pharmaceuticals and business services are looking bright for publishers.

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Vaseline Intensive Care lotion, Vaseline Lip Therapy, Vaseline Intensive Care suncare, Vaseline Intensive Care Hand & Nail Formula lotion, Vaseline Intensive Care UV Daily Defense lotion, Vaseline petroleum jelly, Vaseline Intensive Care bath products, Pond's: McCann-Erickson Worldwide, New York. Audrey McConnell, vp-mgmt rep.

Q-tips cotton swabs: Ogilvy & Mather, New York. Linda Cornelius, grp dir.

Close-Up toothpaste, Rave haircare products Cutex cosmetics, Hero, Windsong, Aviance, Verve & Cachet fragrances: J. Walter Thompson USA, New York. Bruce Kelley, mgmt dir.

ELIZABETH ARDEN INC.: 1345 Ave. of the Americas, 35th Floor/New York, N.Y. 10105/Phone: (212) 261-1000. Joseph X. Spellman, exec vp-mktg devel/creative svcs; Michael Brillhart, exec vp-intl; N. Paul Masturzo, exec vp-gm, Elizabeth Arden U.S.; Bryan H. Janney, vp-gm, Parfums Intl Ltd.; Debra C. McDonough, dir-corp pr/sales promo; Barbara Bank, media dir; Paulette Dufault, vp-adv/creative svcs; James B. Miner, vp-mktg, Elizabeth Arden; Thomas Moloney, vp-mktg, Parfums Intl; Clare A. Cain, vp-mktg devel, fragrance; Victoria Connell, dir-mktg devel, makeup.

In-house.

CALVIN KLEIN COSMETICS CO.: 725 5th Ave./New York, N.Y. 10022/Phone: (212) 759-8888. Kimberly Delsing, pres-ceo; Paulanne Mancuso, exec vp; Carmen Dubroc, sr vp-mktg; Lisa Greenblatt, vp-mktg; Linda Doherty, mktg dir-Obsession line; Karen Berkey, mktg mgr-Obsession line; Sarah Williams, intl mktg mgr-Obsession line; Marianne Darlak, mktg dir-Eternity line; Julie Geduldig, mktg coord-Eternity line; Noel Cook-Terwillger, intl mktg mgr-Eternity line; Diana Waldron, sr mktg dir-Escape; Margie Glasser, mktg mgr-Escape; Terry Burstein, intl mktg mgr-Escape; Robert Green, vp-adv; Jeannie Means, adv dir.

Calvin Klein Cosmetics: CRK, New York (in-house). Tonne Goodman, vp-adv. Media buying: Chiat/Day/Mojo, New York. Mary Maroun, mgmt super.

RANK: 92

Upjohn Co.

Kalamazoo, Mich.
Ad spending: **$119.3 million**

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	2,565	6,782	-62.2
Sunday magazine	0	651	NA
Newspaper	1,297	4,215	-69.2
Outdoor	15	11	32.5
Network TV	45,415	53,894	-15.7
Spot TV	9,831	4,212	133.4
Syndicated TV	2,736	3,807	-28.1
Cable TV networks	6,999	1,001	599.1
Network radio	0	2,585	NA
Spot radio	296	320	-7.4
Measured media	69,153	77,478	-10.7
Unmeasured	50,100	41,700	20.1
Total	119,253	119,178	0.1
By top brands	**1991**	**1990**	**% chg**
Upjohn general promotion (Rogaine)	28,880	23,414	23.3
Motrin IB pain reliever tablets	24,147	31,084	-22.3
Cortaid medicated creams	5,520	3,675	50.2

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	3,402	3,021	12.6
Earnings	537	456	17.9
U.S.	**1991**	**1990**	**% chg**
Sales	2,609	2,246	16.1
Operating profit	652	618	5.5
Division sales	**1991**	**1990**	**% chg**
Human healthcare	2,740	2,406	13.9
Agricultural	662	615	7.6

CORPORATE PROFILE

Upjohn Co. continued walking the thin—though increasingly acceptable—line of advertising in consumer media an ethical drug, Rogaine, the anti-baldness remedy for both men and women.

Upjohn's general promotion advertising, which includes TV spots that promote Rogaine (although not by name), increased 23.3% to $28.9 million in 1991 as spending in print, which mentions Rogaine by name, dropped 63.4% to $3.4 million, according to LNA/Arbitron Multi-Media Service.

Last January, Upjohn broke a print and spot TV campaign for Rogaine topical solution for women. The ads are part of an overall marketing campaign estimated at $18 million to $20 million, or slightly less than half of the $50 million annually spent marketing Rogaine for men. Like the men's campaign, the women's effort offered a certificate worth $10 toward a doctor's visit.

Upjohn built up its anti-diarrheal business paced by Kaopectate by obtaining in late 1990 ten-year rights to market in the U.S. Hoechst-Roussel's Doxidan and Surfak OTC laxatives. Kaopectate drew $4.7 million in media; Doxidan got $2 million in '91.

Motrin IB ibuprofen pain reliever, once a prescription-only drug, pulled a 3.4% share of the $2.3 billion pain remedy market, unseating Bristol-Myers Squibb Co.'s Nuprin as the nation's No. 2 ibuprofen pain reliever, according to Towne-Oller & Associates.

Motrin received $24.1 million in media in 1991, down 22.3% from the prior year, according to LNA/Arbitron Multi-Media Service.

Advil, from American Home Products Corp., remained the ibuprofen leader at 11.7% of total market. The ibuprofen segment accounts for 22.8% of the overall market, compared with 38.4% for aspirin products and 38.8% for acetaminophens.

Upjohn this month moved the creative assignment for Motrin IB to W.B. Doner & Co., Southfield, Mich., from Hill, Holliday, Connors, Cosmopulos, New York. A company spokeswoman cited "long-term business goals" as reason for the switch. Grey Advertising continues to handle media buying.

Much of Upjohn's focus remains on developing ethical drugs, since four core pharmaceuticals—Xanax, an anti-anxiety drug; Halcion, a sleeping aid; Ansaid, a non-steroidal, anti-inflammatory agent; and Micronase, an anti-diabetes aid—lose patent protection in 1993 and 1994. No big replacement products are coming out of the pipeline.

HEADQUARTERS

Upjohn Co./7000 Portage Road/Kalamazoo, Mich. 49001/Phone: (616) 323-4000.

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PERSONNEL, BRANDS, AGENCIES

CORPORATE: Thomas M. Laughlin, corp vp-gm, consumer prods div; Peter R. Seaver, corp vp-worldwide pharmaceutical mktg; Thomas G. Schalk, DVM, corp vp-worldwide animal health; Harold H. Milliken Jr., exec dir-U.S. mktg-consumer prods div; Keith S. Barton, vp-Upjohn Dermatology div.

Motrin IB, Dramamine: W.B. Doner & Co., Southfield, Mich. P.T. Furey, sr vp-grp mgmt super; Brian Newberry, vp-acct super.

Kaopectate, Cortaid, Dexidan: Grey Advertising, New York. Laird Stiefvater, acct super; Kristin Zimmermann, acct exec.

Rogaine: Klemtner Advertising, New York. David Liebeskind, acct exec.

RANK: 62

U.S. dairy farmers

Arlington, Va.
Ad spending: $167.9 million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	15,039	14,780	1.8
Newspaper	76	175	-56.5
Outdoor	1,266	1,307	-3.1
Network TV	24,138	28,742	-16.0
Spot TV	29,174	32,374	-9.9
Syndicated TV	7,884	5,431	45.2
Cable TV networks	8,326	6,510	27.9
Network radio	770	3,285	-76.6
Spot radio	3,996	2,838	40.8
Measured media	90,669	95,442	-5.0
Unmeasured	77,200	81,200	-4.9
Total	167,869	176,642	-5.0

CORPORATE PROFILE

Spending by U.S. dairy boards, tied to milk production, slipped in 1991 over the prior year as production from U.S. dairy farmers and processors slowed to meet reduced demands of a market caught in recession.

Major spender among the dairy groups was the National Dairy Promotion & Research Board, which received $75.6 million to promote dairy products in its fiscal 1992 ended April 30 and spent $53.3 million of that in media in calendar 1991, down 2.9%.

The board allotted a quarter of its 1991 ad budget for the promotion of butter and ice cream, two products vital in their use of milkfat—the bane and the blessing of the dairy industry.

Whole-fat product sales have dropped dramatically over the past two decades; between 1970 and 1990, whole milk sales fell 50%, while low-fat milk sales quadrupled.

The National Dairy Promotion board upped its calendar 1991 spending on butter to $6.2 million from $2.6 million in 1990, according to LNA/Arbitron Multi-Media Service. It's the largest spending body within the Butter Task Force, a coalition of dairy organizations and butter manufacturers formed in 1990. Media spending by the National Dairy Promotion board on all other products dropped.

The board ran two 15-second spots on cable and network TV last December, promoting butter as a key ingredient in holiday baking. In addition, the American Dairy Association joined forces with the board to promote butter through in-store displays touting "Rose's Christmas Cookies" recipes. The campaign helped boost butter sales by 6% for the month, compared with the year before, and a similar promotion is planned for this December, the board said.

The Butter Task Force joined the Hershey Pasta Group, a division of Hershey Foods Corp., to promote butter and noodles during Lent. Last summer, a tie-in campaign with RJR Nabisco cookies helped sell an additional 2.7 million gallons of ice cream. A similar promotion with Hershey's ice cream toppings ran this summer.

But simple promotion of whole-fat dairy products won't be enough to fight consumers' concerns about fat and cholesterol. The National Dairy Promotion board is beginning to research non-food uses for milkfat, such as skincare.

The board broke a $5.6 million spring TV campaign promoting chocolate milk as a children's snack. The campaign was part of the board's plan to target certain milk types to specific markets. TV spots will reappear this fall.

By product, cheese promotion is still the board's largest expenditure, although spending dropped 14% to $14.7 million in 1991, noted LNA.

The largest dairy organization next to the National Dairy Promotion board, the American Dairy Association, spent $28.9 million in media advertising for 1991.

State and national dairy boards are funded by the 1983 Dairy & Tobacco Adjustment Act. According to the act, raw milk volume determines the amount of money available to dairy groups for advertising and promotion.

The milk industry may receive an additional $55 million for fluid milk promotion if milk processors approve a referendum on the 1990 federal farm bill.

HEADQUARTERS

U.S. Dairy Farmers National Dairy Promotion and Research Board/2111 Wilson Blvd., Ste. 600/Arlington, Va. 22201/Phone: (703) 528-4800.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Cynthia Carson, ceo; Dick Schacht, sr vp-mktg/adv; Maureen Varnon, dir-adv/mktg; Catherine Perpetua, Charles Timko, dirs-mktg rsch; Paige Patterson, mgr-consumer rsch.

Adv to health professionals: Bozell Health Care, New York. Anne Petz, vp-acct super.

Consumer & foodservices adv: cheese, butter, ice cream: Grey Advertising, New York. Jordan Rosuck, exec. vp.

Calcium, milk-youth adv: McCann-Erickson Worldwide, San Francisco. Tom Drese, sr vp.

Food processing & manufacturing: Stricevic & O'Connell, Chicago. Daniel Stricevic, Daniel O'Connell, principals.

HEADQUARTERS

American Dairy Association/O'Hare Intl Center/10255 W. Higgins Road, Ste 900/Rosemont, Ill. 60018-5616/Phone: (708) 803-2000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Thomas P. Gallagher, ceo; Gordon M. McDonald, sr vp-adv/mktg svcs; Richard C. Cooper, vp-mktg svcs; Steven A. Dohrmann, vp-mktg planning; Donna A. Arcus, dir-retail promo; Debra L. Olson, dir-foodservice promo.

Fluid milk, REAL seal, cheese, butter, other dairy foods: D'Arcy Masius Benton & Bowles, Chicago. Ben Bishop, sr vp-grp acct dir.

Foodservices: Noble & Associates, Chicago. Susan Saltwell, vp-foodservice.

HEADQUARTERS

California Milk Advisory Board/1213 13th St./Modesto, Calif. 95352/P.O. Box 4680/Modesto, Calif. 95354/Phone: (209) 521-1060.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Ralph Watts, ceo; Adri Boudewyn, dir-comms svcs; Cal Crandall, prog dir-fluid milk.

Manufactured Dairy Products: Foote, Cone & Belding, Los Angeles. Al Jewett, sr vp.

Fluid Milk: McCann-Erickson Worldwide, San Francisco. Jerry Scott, vp-acct dir.

HEADQUARTERS

Oregon Dairy Products Commission/10505 S.W. Barbur Blvd./Portland, Ore. 97219/Phone: (503) 229-5033.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Sheldon Pratt, ceo; Lorinda Moholt, dir comms.

Cheese, fluid milk: In-house.

HEADQUARTERS

Washingon Dairy Products Commission/1107 N.E. 45th St., Ste 205/Seattle, Wash. 98105/Phone: (206) 545-6763.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Rod Erickson, ceo; Steve Matzen, dir-mktg; Doug Simpson, gm.

Dairy Products: Ehrig & Associates, Seattle. Dick Ehrig, acct super.

HEADQUARTERS

Wisconsin Milk Marketing Board/8418 Excelsior Drive/ Madison, Wis. 53717/Phone: (608) 836-8820.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Will Dahl, ceo; Ric Johnson, sr vp-mktg; Bill Drew, vp-prod mgmt; Matt Joyce, vp-comm; Andrea Nen, vp-mktg svcs; Dave Baulnka, mgr-fluid/related prods mktg; Tom O'Connell, mgr-foodservice mktg; Ann Noppe, mgr-food processing mktg; Vicky Jones, mgr-adv/promo.

Cheese: Foote, Cone & Belding, Chicago. Jean MacLaren, mgmt super.

Fluid milk: McCann-Erickson Worldwide, San Francisco. Jerry Scott, acct super.

Food processing: Kocs, Wesson & Associates, Milwaukee. Warren Eulgin, mgmt super.

Dairy product promos: Stephen & Brady, Madison, Wis. Katherine Johnson-Becklin, mgmt super-consumer/foodservice promo.

RANK: 39

U.S. Government

Washington
Ad spending: $253.0 million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	35,723	39,143	-8.7
Sunday magazine	8,052	11,338	-29.0
Newspaper	14,839	15,953	-7.0
Outdoor	832	903	-7.8
Network TV	32,918	53,476	-38.4
Spot TV	27,221	25,242	7.8
Syndicated TV	5,512	5,132	7.4
Cable TV networks	2,723	5,900	-53.9
Network radio	13,856	15,281	-9.3
Spot radio	9,032	9,381	-3.7
Measured media	150,708	181,750	-17.1
Unmeasured	102,300	123,300	-17.0
Total	253,008	305,050	-17.1
By top brands	**1991**	**1990**	**% chg**
U.S. Army	49,830	62,809	-20.7
U.S. Postal Service	49,171	42,525	15.6
U.S. Navy	5,271	14,695	-64.1

CORPORATE PROFILE

Fiscal year 1992 wasn't a good year for government-sponsored ad spending, and the next one promises to be worse.

High-profile government advertising, particularly the multimillion-dollar campaigns of the armed forces and the U.S. Postal Service, has drawn the wrath of Congress.

Government media spending dropped 17% in 1991 to $150.7 million, according to LNA/Arbitron Multi-Media Service. This was the second consecutive year of spending declines. And Congress is asking for more cuts.

The postal service, striving to be more businesslike, was a lightning rod for criticism in 1992 because of its $100 million sponsorship of the Olympics, which it defended as a healthy investment.

But the postal service lost the champion of its Olympic involvement when Postmaster General Anthony Frank resigned. His replacement, Marvin Runyon, came on board in July and immediately put under review the question of future Olympic involvement.

Before any answers were out, he began aggressive cost-cutting, including slashing $33 million from the Olympic marketing budget and paring other ad programs to help deal with the expected $2 billion revenue shortfall expected in fiscal 1993.

The military recruitment ad budget has dropped 44% to $119.4 million for the fiscal year ending Sept. 30, 1992, from a high of $211.6 million in fiscal 1986. It's likely to head further south as Congress questions the need for big ad budgets, as well as for the Pentagon's large recruiting staff, at a time when the armed services are downsizing.

Sen. David Pryor (D., Ark.) has proposed legislation that would cut between $100 million and $350 million from the Pentagon's requested $2.1 billion total recruitment budget for fiscal 1993.

All the branches of the armed forces—the Air Force, Army, Navy, National Guard, Marines and the joint recruiting program—are relying more on public service advertising to stretch recruitment ad dollars. The Army and the Marines were the only branches with paid advertising on network TV in fiscal 1992.

U.S. Mint spent $295,000 in 1991, up 70% for one of the few government spending increases, to promote American Eagle, Christopher Columbus Quincentenary and U.S. Olympic coins.

Despite the military cuts, these accounts are still sought by ad agencies, though the agency incumbents seem to have a firm grip on their business.

BBDO Worldwide, New York, this year kept the Navy's estimated $13.7 million account; Young & Rubicam kept the Army's estimated $57 million recruitment account; Bozell, Alexandria, Va., again won the $11 million Army/Air National Guard account; Hameroff/Milenthal/Spence, Columbus, Ohio, retained the $3.2 million Air Force Reserve account; and Bozell, New York, in 1991 successfully defended the $6.9 million U.S. Air Force account. However, Backer Spielvogel Bates in 1991 took the Department of Defense's $6.5 million joint recruiting ad account from Grey Advertising.

Other ad accounts include National Railroad Passenger Corp., better known as Amtrak, which has a $40.4 million ad and promotion budget for fiscal 1992. DDB Needham Worldwide kept the account. The Department of Housing and Urban Development hired J. Walter Thompson USA, Atlanta, in August 1991 for its estimated $10 million account.

HEADQUARTERS

U.S. Government/Washington.

PERSONNEL, BRANDS, AGENCIES

DEPARTMENT OF DEFENSE: Office of the Assistant Secretary of Defense/FM&P (MM&PP) (AP)/The Pentagon, Room 2B271/Washington, D.C. 20301/Phone: (703) 697-9271. Lt. Gen. Robert M. Alexander, USAF deputy asst secretary defense, military manpower & personnel policy; Dr. Wayne S. Sellman, dir-accession policy, office of asst sec of defense-force mgmt & personnel; Lt. Col. Martha Cavaiani, USA deputy dir for adv and contracting officer's rep.

JOINT RECRUITING ADV PROGRAM: 1600 Wilson Blvd, Suite 400/Arlington, Va. 22209/Phone: (703) 696-6678. Lt. Col. Caryl Tallon, USA dir-joint recruiting adv program; Maj. Maria Maldonado, USA chief budget and finance; Capt. Kirk Faryniasz, USAF chief adv operations; Lt. Com. Patricia Anthony, USN adv program mgr; Capt. Matthew Long, USMC adv program mgr; Lt. Nguyen Ha, USCG adv program mgr.

Joint Recruiting: Backer Spielvogel Bates, New York. Mark Morris, exec vp-acct mgmt dir; Janet Stanton, sr vp-mgmt rep.

DEPARTMENT OF THE ARMY: Office of the Deputy Chief of Staff Personnel/Marketing & Advertising/Washington, D.C. 20310/Phone: (703) 695-1144. Robert S. Silberman, asst sec-Army manpower and reserve affairs; Lt. Gen. Thomas P. Carney, deputy chief of staff-personnel; Lt. Col. Gregory T. McGuckin, chief-mktg/adv, office of deputy chief of staff-personnel; Maj. Wayne M. White, adv program mgr.

U.S. ARMY RECRUITING COMMAND: Office of the Deputy Chief of Staff Personnel/Marketing & Advertising/Washington, D.C. 20310/Phone: (703) 695-1144. Maj. Gen. Jack C. Wheeler, commanding general-U.S. Army Recruiting Command; Col. John C. Myers, dir-adv/sales promo/public affairs; Thomas Evans, deputy dir-adv/sales promo/public affairs.

U.S. ARMY RESERVE: Office of the Deputy Chief of Staff Personnel/Marketing & Advertising/Washington, D.C. 20310/Phone: (703) 695-1144. Maj. Gen. Roger W. Sandler, chief-U.S. Army Reserve; Joseph G. Hanely, dir-public affairs & adv, office of chief-Army Reserve; Albert W. Schilf, deputy dir-public affairs & adv office.

U.S. ARMY ROTC CADET COMMAND: Office of the Deputy Chief of Staff Personnel/Marketing & Advertising/Washington, D.C. 20310/Phone: (703) 695-1144. Maj. Gen. Wallace C. Arnold, commanding general-U.S. Army ROTC Cadet Command; Col. Michael V. Sullivan, dir-mktg/adv/public affairs directorate; Lt. Col. John B. Gately, adv mgr.

U.S. Army, Army Reserve, Army ROTC: Young & Rubicam, New York. John Glorieux, exec vp-mg dir.

U.S. NAVY: Navy Recruiting Command/4015 Wilson Blvd./Arlington, Va. 22203/Phone: (703) 696-4959. Capt. H.J. Zinser, dir-recruiting, adv dept; Stephen Abbott, dir-adv operations div.

BBDO Worldwide, New York. Dave Seal, sr vp-acct dir.

U.S. MARINE CORP.: Headquarters Marine Corp./MRM/2 Navy Annex/Washington, D.C. 20380-1775/Phone: (703) 614-1935. Brig. Gen. James R. Davis, dir-personnel mgmt/procurement divs; Lt. Col. Robert E. Wilson Jr., head-mktg branch.

J. Walter Thompson USA, Atlanta. Chris Hall, sr vp-grp acct dir.

U.S. AIR FORCE: U.S. Air Force Recruiting Service/RSAA/Randolph Air Force Base, Texas 78150-5421/Phone: (512) 652-4916. Brig. Gen. Michael G. Vergamini, commander-USAF recruiting svcs; Col. Ronald W. Shealy, dir-adv/promo; Tim Talbert, chief-adv div; Albert Rodriguez, chief-mgmt div.

Bozell, New York: Doug Laughlin, vp-mgmt rep.; David Boyd, acct super-Dallas.

U.S. AIR FORCE RESERVE: HQ AFRES RSA/64 Green St./Warner Robins, Ga. 31093-1005/Phone: (912) 926-3374. Col. Craig A. Lindberg, deputy chief of staff recruiting; Lt. Col. Ronald B. Hall, dir of adv; Chief Master Sgt. John N. Pitsenbarger, chief of adv.

Hameroff/Milenthal/Spence, Columbus, Ohio. Paula A. Spence, pres; Dan Miller, acct exec.

NATIONAL GUARD: Army National Guard Bureau/ARP-RRMFOA/Washington, D.C. 20310-2500/Phone: (703) 756-8850. Air National Guard Bu-

There are two kinds of heart attack victims.

The quick and the dead.

A heart attack doesn't have to be fatal. Getting to a hospital quickly can make the difference between life and death.

New life-saving therapies are now available to treat heart attack victims. But they have to be given early.

You know the symptoms: An uncomfortable pressure, squeezing or pain in the center of the chest. Pain spreading to the shoulders, neck, jaw, arms or back. Shortness of breath. Lightheadedness, fainting, sweating or nausea.

When you feel these symptoms, don't delay. Get to a hospital quickly. It could save your life. For more information write or call your nearest American Heart Association.

You can help prevent heart disease. We can tell you how.

American Heart Association

This space provided as a public service.

DIVERSIONS
diversions

100 Leading National Advertisers

Rank			Total U.S. ad spending			Unmeasured spending		Total measured media		Measured print			Measured broadcast		
1991	1990	Advertiser, U.S. headquarters	1991	1990	% chg	1991	1990	1991	1990	1991	1990	% chg	1991	1990	% chg
1	1	**Procter & Gamble Co.**, Cincinnati	**$2,149.0**	$2,277.3	-5.6	$982.5	$1,041.2	$1,166.5	$1,236.1	$150.9	$167.4	-9.8	$1,015.0	$1,068.2	-5.0
2	2	**Philip Morris Cos.**, New York	**2,045.6**	2,217.5	-7.8	935.2	1,013.8	1,110.4	1,203.7	245.3	295.4	-17.0	795.4	831.2	-4.3
3	4	**General Motors Corp.**, Detroit	**1,442.1**	1,503.1	-4.1	385.6	401.9	1,056.5	1,101.2	301.9	262.9	14.9	748.2	834.3	-10.3
4	3	**Sears, Roebuck & Co.**, Chicago	**1,179.4**	1,507.9	-21.8	717.1	916.8	462.3	591.1	112.0	174.0	-35.6	350.0	416.1	-15.9
5	6	**PepsiCo**, Purchase, N.Y.	**903.4**	855.0	5.7	361.4	307.8	542.0	547.2	10.3	14.1	-26.8	528.9	528.3	0.1
6	5	**Grand Metropolitan**, London	**744.7**	883.2	-15.7	417.0	480.8	327.7	402.4	89.3	87.2	2.4	230.7	306.7	-24.8
7	15	**Johnson & Johnson**, New Brunswick, N.J.	**733.0**	603.3	21.5	361.9	297.9	371.1	305.4	59.4	30.3	96.1	311.7	275.0	13.4
8	8	**McDonald's Corp.**, Oak Brook, Ill.	**694.8**	764.8	-9.2	307.4	338.4	387.4	426.4	6.6	3.9	69.8	373.9	417.4	-10.4
9	14	**Ford Motor Co.**, Dearborn, Mich.	**676.6**	615.1	10.0	158.9	144.5	517.7	470.6	180.2	175.1	2.9	335.8	293.0	14.6
10	13	**Eastman Kodak Co.**, Rochester, N.Y.	**661.4**	625.2	5.8	444.3	406.4	217.1	218.8	44.6	50.3	-11.3	171.6	166.7	3.0
11	12	**Warner-Lambert Co.**, Morris Plains, N.J.	**656.5**	633.2	3.7	432.0	416.6	224.5	216.6	18.2	21.9	-17.1	206.1	193.6	6.4
12	16	**Toyota Motor Corp.**, Toyota City, Japan	**632.2**	580.7	8.9	189.7	174.2	442.5	406.5	118.3	92.6	27.8	322.4	312.7	3.1
13	7	**AT&T Co.**, New York	**617.3**	798.7	-22.7	225.6	291.9	391.7	506.8	82.4	116.5	-29.3	308.8	390.0	-20.8
14	10	**Nestle SA**, Vevey, Switzerland	**600.5**	639.1	-6.0	292.9	311.7	307.6	327.4	85.7	78.5	9.1	221.6	248.0	-10.6
15	18	**Unilever NV**, London/Rotterdam	**593.7**	568.9	4.4	222.3	213.0	371.4	355.9	82.0	74.2	10.4	288.9	281.0	2.8
16	9	**Time Warner**, New York	**587.5**	680.7	-13.7	276.2	320.0	311.3	360.7	106.1	118.4	-10.4	204.7	241.8	-15.4
17	17	**Kellogg Co.**, Battle Creek, Mich.	**577.7**	577.7	-0.0	196.4	173.3	381.3	404.4	5.1	9.1	-43.4	376.1	395.3	-4.8
18	11	**RJR Nabisco**, New York	**571.0**	636.1	-10.2	285.5	286.8	285.5	349.3	71.2	98.9	-27.9	162.6	198.1	-17.9
19	20	**General Mills**, Minneapolis	**555.6**	539.0	3.1	136.5	132.4	419.1	406.6	18.2	21.7	-16.1	400.3	384.4	4.1
20	21	**Chrysler Corp.**, Highland Park, Mich.	**531.1**	528.5	0.5	116.3	115.7	414.8	412.8	126.2	119.1	6.0	287.5	292.7	-1.8
21	19	**Kmart Corp.**, Troy, Mich.	**527.2**	563.8	-6.5	337.4	332.6	189.8	231.2	73.7	142.6	-48.3	115.9	88.5	31.0
22	22	**Anheuser-Busch Cos.**, St. Louis	**508.4**	458.9	10.8	180.5	157.8	327.9	301.1	26.9	12.0	124.0	289.4	283.1	2.2
23	23	**Walt Disney Co.**, Burbank, Calif.	**489.1**	436.1	12.1	231.8	206.7	257.3	229.4	55.5	55.3	0.5	201.4	173.5	16.1
24	25	**American Home Products Corp.**, New York	**447.1**	415.4	7.6	156.5	181.1	290.6	234.3	15.8	15.2	4.4	274.7	219.2	25.4
25	26	**Sony Corp.**, Tokyo	**438.6**	412.1	6.4	175.8	165.2	262.8	246.9	123.6	116.1	6.4	138.9	130.5	6.5
26	36	**H.J. Heinz Co.**, Pittsburgh	**403.1**	308.1	30.8	326.0	173.8	77.1	134.3	13.7	25.2	-45.7	63.2	109.1	-42.0
27	31	**Ralston Purina Co.**, St. Louis	**393.5**	354.5	11.0	251.9	226.9	141.6	127.6	26.9	30.5	-11.9	114.6	97.0	18.2
28	29	**Coca-Cola Co.**, Atlanta	**367.4**	377.4	-2.7	148.6	152.7	218.8	224.7	11.9	12.0	-0.6	204.7	210.6	-2.8
29	28	**J.C. Penney Co.**, Dallas	**362.6**	393.9	-8.0	257.4	240.3	105.2	153.6	42.2	86.3	-51.1	62.9	67.3	-6.5
30	24	**Bristol-Myers Squibb Co.**, New York	**352.5**	428.8	-17.8	168.5	205.0	184.0	223.8	34.2	42.0	-18.6	149.3	181.7	-17.8
31	34	**Honda Motor Co.**, Tokyo	**333.1**	318.1	4.7	90.6	86.5	242.5	231.6	70.7	72.7	-2.7	170.5	158.0	7.9
32	38	**Hershey Foods Corp.**, Hershey, Pa.	**298.9**	302.0	-1.0	224.9	193.3	74.0	108.7	6.1	9.3	-33.8	67.8	99.4	-31.8
33	32	**Matsushita Electric Industrial Co.**, Osaka, Japan	**292.3**	332.2	-12.0	146.2	166.2	146.1	166.0	42.7	60.5	-29.4	100.1	101.5	-1.4
34	41	**R.H. Macy & Co.**, New York	**289.4**	272.2	6.3	100.7	94.7	188.7	177.5	143.9	163.7	-12.1	44.5	13.6	226.6
35	30	**May Department Stores Co.**, St. Louis	**277.3**	371.6	-25.4	83.2	111.5	194.1	260.1	162.6	226.7	-28.3	31.5	33.3	-5.3
36	35	**Sara Lee Corp.**, Chicago	**273.0**	308.7	-11.5	143.5	162.2	129.5	146.5	33.7	35.5	-5.1	95.3	110.8	-14.0
37	27	**Nissan Motor Co.**, Tokyo	**268.9**	410.2	-34.5	56.9	86.8	212.0	323.4	41.4	63.6	-34.8	169.2	258.1	-34.4
38	40	**Mars Inc.**, McLean, Va.	**253.9**	272.4	-6.8	125.7	123.6	128.2	148.8	13.3	4.4	204.7	114.7	144.2	-20.4
39	37	**U.S. Government**, Washington	**253.0**	305.0	-17.1	102.3	123.3	150.7	181.7	58.6	66.4	-11.8	91.3	114.4	-20.2
40	45	**ConAgra**, Omaha, Neb.	**249.7**	246.6	1.3	137.8	136.1	111.9	110.5	21.9	19.2	14.2	89.8	91.3	-1.6
41	42	**Quaker Oats Co.**, Chicago	**237.7**	268.2	-11.4	126.0	133.8	111.7	134.4	27.4	26.2	4.6	84.0	107.7	-22.0
42	39	**Colgate-Palmolive Co.**, New York	**227.5**	287.2	-20.8	157.1	198.4	70.4	88.8	10.8	10.6	2.6	58.6	76.8	-23.8
43	33	**Dayton Hudson Corp.**, Minneapolis	**226.5**	319.0	-29.0	117.8	151.2	108.7	167.8	48.0	112.3	-57.3	59.8	55.5	7.8
44	49	**American Express Co.**, New York	**226.4**	217.7	4.0	70.2	63.6	156.2	154.1	52.3	54.0	-3.0	103.1	99.6	3.5
45	57	**Nike Inc.**, Beaverton, Ore.	**223.3**	178.8	24.9	113.8	91.1	109.5	87.7	32.0	25.3	26.3	77.4	62.2	24.6
46	43	**Federated Department Stores**, Cincinnati	**222.8**	251.6	-11.4	111.4	95.6	111.4	156.0	94.3	137.0	-31.2	17.1	19.0	-9.9
47	48	**American Brands**, Old Greenwich, Conn.	**217.5**	227.4	-4.4	120.9	126.4	96.6	101.0	76.8	81.1	-5.3	7.6	8.8	-14.7
48	44	**Mazda Motor Corp.**, Hiroshima, Japan	**215.0**	247.9	-13.3	57.8	66.7	157.2	181.2	49.3	54.7	-9.9	107.3	124.3	-13.7
49	70	**Circuit City Stores**, Richmond, Va.	**213.7**	153.0	39.7	85.5	61.2	128.2	91.8	73.8	41.3	78.9	54.3	50.5	7.5
50	47	**Tandy Corp.**, Fort Worth, Texas	**213.3**	232.7	-8.3	134.3	146.5	79.0	86.2	42.0	53.8	-21.8	36.9	32.4	14.0
51	55	**SmithKline Beecham**, London	**208.3**	191.2	9.0	125.0	88.9	83.3	102.3	2.0	3.1	-34.1	81.3	99.2	-18.1
52	54	**Adolph Coors Co.**, Golden, Colo.	**206.9**	194.7	6.3	76.6	72.1	130.3	122.6	4.3	4.5	-2.5	122.8	115.1	6.7
53	51	**American Stores Co.**, Salt Lake City	**201.6**	205.4	-1.9	74.6	76.0	127.0	129.4	57.4	70.0	-18.0	68.9	58.7	17.4
54	53	**Hasbro Inc.**, Pawtucket, R.I.	**201.4**	195.2	3.2	40.3	36.4	161.1	158.8	7.7	5.3	44.5	153.4	153.5	-0.0
55	46	**General Electric Co.**, Fairfield, Conn.	**198.8**	235.8	-15.7	108.0	128.1	90.8	107.7	51.8	55.2	-6.3	37.8	51.3	-26.3
56	52	**Schering-Plough Corp.**, Madison, N.J.	**198.4**	201.2	-1.4	102.5	140.8	95.9	60.4	16.6	21.3	-22.4	79.3	38.8	104.4
57	71	**Wal-Mart Stores**, Bentonville, Ark.	**189.8**	151.9	25.0	113.1	90.5	76.7	61.4	20.8	18.6	12.1	55.8	42.6	30.9
58	62	**Clorox Co.**, Oakland, Calif.	**182.6**	173.4	5.3	54.8	44.3	127.8	129.1	10.7	14.8	-27.7	117.1	114.3	2.5
59	68	**Gillette Co.**, Boston	**182.5**	155.4	17.4	89.4	73.3	93.1	82.1	10.3	18.9	-45.5	82.8	63.2	31.0
60	65	**Paramount Communications**, New York	**179.4**	160.9	11.5	70.9	63.6	108.5	97.3	28.8	30.8	-6.5	78.7	65.0	21.1
61	63	**S.C. Johnson & Son**, Racine, Wis.	**174.0**	169.3	2.8	80.9	76.6	93.1	92.7	13.8	11.9	15.9	78.9	80.1	-1.5
62	60	**U.S. dairy farmers**, Arlington, Va.	**167.9**	176.6	-5.0	77.2	81.2	90.7	95.4	15.1	15.0	1.1	74.3	79.2	-6.2
63	89	**Delta Air Lines**, Atlanta	**164.5**	126.7	29.8	41.1	31.7	123.4	95.0	63.9	40.6	57.4	57.3	52.6	9.0
64	61	**Campbell Soup Co.**, Camden, N.J.	**164.1**	175.3	-6.4	54.6	58.4	109.5	116.9	26.9	18.5	45.5	82.6	98.4	-16.1
65	73	**Helene Curtis Industries**, Chicago	**157.4**	145.4	8.2	66.1	49.2	91.3	96.2	19.5	23.2	-15.7	71.8	72.7	-1.3
66	67	**Carter Hawley Hale Stores**, Los Angeles	**151.9**	157.4	-3.5	69.0	71.5	82.9	85.9	72.5	74.1	-2.1	10.4	11.8	-12.4
67	76	**AMR Corp.**, Dallas	**150.1**	142.5	5.3	40.2	38.2	109.9	104.3	77.4	76.4	1.3	32.1	27.5	16.7
68	64	**ITT Corp.**, New York	**141.5**	161.2	-12.2	104.0	118.5	37.5	42.7	15.0	18.7	-19.6	21.9	23.2	-5.2
69	78	**Marriott Corp.**, Washington	**139.7**	139.6	0.1	90.8	88.4	48.9	51.2	25.0	25.1	-0.4	22.8	24.6	-7.4
70	130	**MCI Communications Corp.**, Washington	**139.5**	82.6	68.9	45.4	26.9	94.1	55.7	3.2	10.5	-69.6	90.4	45.2	100.3
71	84	**Thompson Medical/Slim-Fast Food Cos.**, New York	**137.5**	133.2	3.3	34.4	23.2	103.1	110.0	10.3	18.4	-44.0	92.8	91.5	1.4
72	88	**News Corp.**, Sydney	**135.8**	127.9	6.1	5.9	5.6	129.9	122.3	41.1	43.9	-6.3	88.2	77.8	13.3
73	59	**Philips NV**, Eindhoven, Netherlands	**133.1**	177.7	-25.1	66.4	88.6	66.7	89.1	15.7	21.1	-25.3	51.0	68.0	-25.1
74	102	**Dr Pepper/Seven-Up Cos.**, Dallas	**131.4**	110.5	18.9	46.5	39.1	84.9	71.4	0.4	0.2	103.6	84.0	70.9	18.5
75	80	**CPC International**, Englewood Cliffs, N.J.	**131.4**	137.0	-4.1	92.0	86.8	39.4	50.2	3.7	3.6	2.5	35.8	46.6	-23.3
76	69	**Sprint Corp.**, Shawnee Mission, Kan.	**131.4**	155.3	-15.4	62.6	74.0	68.8	81.3	3.7	2.8	29.5	65.0	78.3	-17.0
77	58	**Goodyear Tire & Rubber Co.**, Akron, Ohio	**130.7**	178.7	-26.9	75.8	107.8	54.9	70.9	14.9	20.8	-28.4	39.9	50.1	-20.4
78	66	**Levi Strauss & Co.**, San Francisco	**129.4**	158.9	-18.5	75.6	92.8	53.8	66.1	7.0	8.4	-17.1	44.2	57.5	-23.1
79	56	**Loews Corp.**, New York	**129.0**	186.4	-30.8	57.0	82.4	72.0	104.0	30.1	54.0	-44.2	6.8	11.0	-37.7
80	74	**Revlon Group**, New York	**128.0**	143.4	-10.8	64.1	71.8	63.9	71.6	32.4	46.1	-29.6	31.4	25.5	23.1
81	83	**Bell Atlantic Corp.**, Philadelphia	**127.5**	134.7	-5.3	82.9	76.9	44.6	57.8	5.9	7.4	-21.0	38.1	50.1	-23.8
82	75	**Dow Chemical Co.**, Midland, Mich.	**127.1**	142.7	-10.9	32.5	36.5	94.6	106.2	26.8	27.8	-3.7	67.8	78.4	-13.5
83	50	**Montgomery Ward & Co.**, Chicago	**126.7**	205.6	-38.4	63.1	102.4	63.6	103.2	44.1	82.7	-46.7	19.5	20.5	-4.6
84	133	**Reebok International**, Stoughton, Mass.	**126.5**	81.0	56.2	50.8	32.5	75.7	48.5	24.7	18.0	37.1	50.8	29.5	71.9
85	82	**Seagram Co.**, Montreal	**126.3**	135.2	-6.6	32.3	34.6	94.0	100.6	36.8	35.4	3.8	49.4	56.3	-12.2
86	87	**Wm. Wrigley Jr. Co.**, Chicago	**125.4**	129.1	-2.8	13.8	10.8	111.6	118.3	7.6	6.1	24.4	103.1	111.2	-7.3
87	95	**Wendy's International**, Dublin, Ohio	**124.1**	119.8	3.6	29.7	28.7	94.4	91.1	0.0	0.1	-92.3	92.5	89.5	3.4
88	91	**Daimler-Benz AG**, Stuttgart, Germany	**122.2**	124.7	-2.0	31.6	32.3	90.6	92.4	44.7	40.4	10.4	45.2	51.8	-12.8
89	72	**Hallmark Cards**, Kansas City, Mo.	**121.8**	146.8	-17.0	49.6	59.8	72.2	87.0	21.4	12.9	65.6	50.4	74.1	-31.9
90	77	**Mobil Corp.**, New York	**120.0**	140.3	-14.4	83.2	97.2	36.8	43.1	6.4	9.8	-35.4	30.5	33.2	-8.3
91	81	**Hyundai Group**, Seoul	**119.5**	135.3	-11.6	34.2	38.7	85.3	96.6	23.2	19.2	20.7	61.6	76.9	-19.8
92	97	**Upjohn Co.**, Kalamazoo, Mich.	**119.3**	119.2	0.1	50.1	41.7	69.2	77.5	3.9	11.6	-66.8	65.3	65.8	-0.8
93	92	**UAL Corp.**, Elk Grove Village, Ill.	**119.2**	124.2	-4.0	47.7	39.9	71.5	84.3	28.0	27.5	2.1	43.4	56.8	-23.6
94	96	**Canon Inc.**, Tokyo	**117.6**	119.5	-1.6	52.9	53.8	64.7	65.7	27.5	34.6	-20.5	36.6	30.5	19.9
95	103	**Ciba-Geigy**, Basel, Switzerland	**115.4**	109.8	5.0	66.6	63.4	48.8	46.4	22.8	13.8	64.7	26.0	32.6	-20.4
96	94	**U.S. Shoe Corp.**, Cincinnati	**113.3**	120.7	-6.1	62.3	64.3	51.0	56.4	10.3	10.7	-4.0	40.3	45.4	-11.2
97	129	**B.A.T Industries**, London	**113.0**	82.7	36.6	50.7	37.1	62.3	45.6	30.5	28.5	7.0	7.4	7.7	-3.0
98	104	**Kimberly-Clark Corp.**, Irving, Texas	**107.7**	104.1	3.4	22.3	21.5	85.4	82.6	20.8	23.1	-9.7	64.5	59.6	8.3
99	156	**American Cyanamid Co.**, Wayne, N.J.	**105.2**	64.4	63.3	52.6	32.2	52.6	32.2	6.3	4.7	34.0	46.3	27.5	68.5
100	99	**Monsanto Co.**, St. Louis	**100.8**	114.8	-12.2	37.3	41.7	63.5	73.1	17.2	12.8	33.9	46.3	60.3	-23.2

Notes: Dollars are in millions. All figures are AA estimates. 1990 rankings are adjusted to reflect figures shown. Print includes magazines and newspapers. Broadcast includes TV, radio and cable. See Page 72 for sources and methodology.

AA Chart: Kevin Brown

reau/DPRA/Washington, D.C. 20310-2500/Phone: (301) 981-8408. Lt. Col. David B. Sanfavon, chief-Army National Guard recruiting & retention div; Lt. Col. William Illing, chief-Air National Guard recruiting and retention div.

Bozell, Alexandria, Va.; Ron Owens, vp-mgmt rep.

TRANSPORTATION DEPARTMENT-COAST GUARD: U.S. Coast Guard Recruit Advertising/Commandant G-PRJ-4/2100 Second St. SW/Washington, D.C. 20593-0001/Phone: (202) 267-1742. Capt. L.S. Rumley, chief-recruiting and job entry div; Lt. Cmdr Steve Hein, dir natl adv.

No agency—in review.

U.S. POSTAL SERVICE: Office of Advertising/475 L'Enfant Plaza SW Room 5410/Washington, D.C. 20710-2011/Phone: (202) 268-3373. Edward Horgan Jr., vp-mktg and sales; Rod DeVar, dir-adv & promo.

Young & Rubicam, New York. David Sable, grp dir.

AMTRAK: 60 Massachusetts Ave. NE/Washington, D.C. 20002/Phone: (202) 906-2030. William S. Norman, exec vp; Robert Gall, vp-passenger mktg and sales; Joan E. Wheatley, dir-adv/sales promo.

DDB Needham Worldwide, New York. Kent DeFelice, exec vp-bus unit dir.

U.S. MINT: 633 Third St. NW/Marketing - Seventh Floor/Washington, D.C. 20220/Phone: (202) 874-6468. Kevin Cullinane, acting assoc dir-mktg; Mrs. Michael Burke, adv mgr.

American Eagle Coin, Columbus Quincentenary Coin: Grey Advertising, New York. Robert Ravitz, exec vp-mgmt rep.

Olympic Coins: The Special Projects Group, Englewood Cliffs, N.J. David Willis, pres.

White House Anniversary Coin: Henry J. Kaufman & Associates, Washington, D.C. Joy Stephenson, vp-mgmt super.

HOUSING AND URBAN DEVELOPMENT: 451 Seventh St. SW Room 9170/Washington, D.C. 20410/Phone: (202) 708-1832. Richard Bradley, govt technical rep (responsible for adv and mktg program).

J. Walter Thompson, Atlanta: Brent Katzmann, acct dir.

RANK: 96

U.S. Shoe Corp.

Cincinnati
Ad spending: **$113.3** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	8,120	6,881	18.0
Sunday magazine	1,181	1,004	17.7
Newspaper	972	2,815	-65.5
Outdoor	366	233	57.1
Network TV	12,156	9,196	32.2
Spot TV	26,743	34,747	-23.0
Syndicated TV	19	4	416.7
Cable TV networks	665	870	-23.6
Spot radio	742	616	20.5
Measured media	50,963	56,364	-9.6
Unmeasured	62,300	64,300	-3.1
Total	113,263	120,664	-6.1
By top brands	**1991**	**1990**	**% chg**
LensCrafters opticians store	31,595	37,654	-16.1
Easy Spirit sporting footwear	13,603	11,572	17.6

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	2,726	2,719	0.3
Earnings	31	(31)	NA
Division sales	**1991**	**1990**	**% chg**
Women's apparel	1,364	1,336	2.1
LensCrafters Optical	625	580	7.7
Footwear	737	803	-8.3

CORPORATE PROFILE

Specialty retailer U.S. Shoe Corp. marked its 60th anniversary in 1991 by continuing a restructuring program that has eliminated more than 10% of its retail stores since 1990.

Media spending also declined by 9.6% as sales grew only marginally. Earnings returned to the plus column after an after-tax restructuring charge of $57.6 million was levied against earnings in 1990.

Weak consumer spending held sales growth to 2%, both actual and same-store, in the women's apparel retailing group, which accounts for about half the company's net sales. However, in first quarter 1992 total sales were down 11.1% from the prior-year period.

Media spending for Casual Corner, which accounts for 87% of media spending by the women's apparel group, was down nearly 40% to only $918,000 in the quarter.

Poor performance from Casual Corner stores has led the company to eliminate the "Work hard, play hard, shop easy" campaign, which was launched in 1991 to emphasize expanded sportswear offerings. The agency that created the campaign, Advertising to Women, New York, was dropped and the advertising taken in-house. Casual Corner is now refocusing its marketing efforts on clothing for working women, always a strong part of its business.

U.S. Shoe is increasing its number of special-size apparel stores, adding 36 Petite Sophisticate and August Max Woman stores, with more planned for 1992. It's also testing Capezio women's apparel stores, featuring moderately priced casual and active wear; remaining Ups 'N Downs stores will convert to Capezio over the next two years.

The Three Career Image Company Store was created to target the factory outlet segment; five more are planned for 1992.

Sales of the optical retailing group grew 8% in actual terms in 1991, though they declined 2% for comparable stores. Revenues grew 6.5% in the first quarter 1992. LensCrafters accounts for about a third of optical superstores in the U.S., giving it about 6% of the $10 billion retail eyewear market.

During 1991, operating earnings in the optical group were offset by expenses incurred in start-up costs for LensCrafters operations in the U.K. Media spending for the optical group was off 15.7% to $32.3 million for 1991.

LensCrafters shifted its focus from new store growth in 1991 to creating a more profitable cost structure and better positioning in the eyewear market. The latter was reflected in its marketing and advertising, which were refined to focus on providing eyewear with superior comfort and fit, rather than just 1-hour service.

The number of Sight & Save stores, the company's value optical retailing test, increased to 10 in 1991, with more planned for the coming year. Sight & Save outlets are located in a number of Kmart Corp. stores.

Despite sales increases from the Easy Spirit line, sales of the footwear group fell 8% as operating income dropped 10% from 1990. Part of the income decline was attributed to start-up costs of the Easy Spirit men's line, which hit the market earlier this year. In the first quarter 1992, footwear sales were off 1.1%.

Easy Spirit earlier this month awarded the creative on its $15 million-plus account to Fallon McElligott, Minneapolis, from McElligott Wright Morrison White, Minneapolis. Fallon beat out a bid by DDB Needham Worldwide, New York, whose effort was pitched by former McElligott Wright principals.

Media spending for all footwear brands increased 14.9% to $17.6 million in 1991, according to LNA/Arbitron Multi-Media Service. Ad support for women's Easy Spirit shoes rose 24.1% to $15.3 million, mostly in spot TV, a commitment second only to ad backing for LensCrafters among U.S. Shoe operations.

HEADQUARTERS

U.S. Shoe Corp./One Eastwood Drive/Cincinnati, Ohio 45227/Phone: (513) 527-7000.

PERSONNEL, BRANDS, AGENCIES

FOOTWEAR MANUFACTURING, WHOLESALING AND RETAILING GROUP: One Eastwood Drive/Cincinnati, Ohio 45227/Phone: (513) 527-7000. Claire Brinker, vp-mktg, Easy Spirit; Jeanie Messer, mktg/sales promo dir-Cobbie Shoes; Ellen Harris, mktg/adv dir-Selby Shoes; Sue Blaney, adv/sales dir-Joyce Shoes; Melissa Swett, mktg dir-corp concept stores.

Easy Spirit Shoes (men & women): Fallon McElligott, Minneapolis. Steve Sjoblad, president. Media buying: Media That Works, Cincinnati. Ann Laun, acct mgr, women; Brian McHale, acct mgr, men.

Selby Shoes: Creative: In-house. Media: Customized Media, New York. Geri Powers.

Capezio, Cobbie, Joyce, Pappagallo: Creative: In-house. Media buying: Media That Works, Cincinnati. Lyn Jarc, acct super—Capezio, Joyce, Pappagallo; Andrea Hounshell, acct mgr-Cobbie.

Retailing: Banister/Capezio Factory Direct, The Cobbie Shop, Cincinnati Shoe Company, Easy Spirit Shoe Stores, Joyce-Selby Shoes, Shop for Pappagallo: Creative: In-house. Media: Media That Works, Cincinnati. Lyn Jarc, acct super.

LENSCRAFTERS OPTICAL GROUP: 8650 Governor's Hill Dr./Cincinnati, Ohio 45249/Phone: (513) 583-6000. Kerry Bradley, mktg dir. Creative: In-house. Media buying: Media That Works, Cincinnati. Susan Buckley, acct super.

WOMEN'S APPAREL RETAILING GROUP: 107 Phoenix Ave./Enfield, Conn. 06082/Phone: (203) 741-0771. Greg Lechner, mktg dir.

August Max Woman, Caren Charles, Career Image Company Store, Casual Corner, Petite Sophisticate, Ups 'N Downs: Creative and media are both in-house.

RANK: 57

Wal-Mart Stores

Bentonville, Ark.
Ad spending: **$189.8** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	3,839	3,597	6.7
Sunday magazine	14,971	11,722	27.7
Newspaper	2,006	3,253	-38.3
Outdoor	151	190	-20.4
Network TV	17,745	2,505	608.4
Spot TV	35,976	39,408	-8.7
Syndicated TV	103	0	NA
Cable TV networks	1,870	639	192.7
Spot radio	81	61	32.4
Measured media	76,742	61,374	25.0
Unmeasured	113,100	90,500	25.0
Total	189,842	151,874	25.0
By top brands	**1991**	**1990**	**% chg**
Wal-Mart misc. mdse.	50,080	30,203	65.8
Wal-Mart apparel	6,986	10,957	-36.2
Wal-Mart sport, toy & hobby	5,082	5,826	-12.8

SALES & EARNINGS ($ in millions)

Worldwide	1992	1991	% chg
Sales	43,887	32,602	34.6
Earnings	1,608	1,291	24.6

CORPORATE PROFILE

Wal-Mart Stores, the nation's top retailer, continues on its aggressive growth strategy with plans to be a $125 billion company by the year 2000.

Expansion in fiscal 1993, ending Jan. 31, calls for opening 160 Wal-Mart stores, 45 Sam's Clubs and 15 Supercenters. Such growth is largely the reason for the company's 25% boost in advertising.

The company has inspired its employees to carry on in the tradition of Sam Walton, founder and chairman, who died in April. S. Robson Walton, 47, succeeded his father as chairman. David Glass remains president-ceo.

Wal-Mart last spring put a new twist on its everyday low price positioning with a major ad campaign themed "Rollback America." Upbeat TV commercials and in-store signage told consumers that Wal-Mart is rolling up its sleeves and rolling back prices. Bernstein-Rein, Kansas City, Mo., is the agency.

At the same time, the company launched a co-operative ad effort with suppliers, Valvoline Inc. and Dial Corp. GSD&M, Austin, Texas, created the campaign.

Wal-Mart encountered negative feedback when Mr. Glass said the retailer would only deal directly with manufacturers bypassing sales reps to streamline the distribution process. That policy appears still to be in effect.

Though Wal-Mart still relies on selling branded merchandise at low prices, the company last fall initiated a private-label program under the Sam's American Choice name. The line consists of more than 20 products, including cookies, soft drinks, tortilla chips, picante sauce, nondairy creamer, popcorn and fruit drinks.

Tools sold under the *Popular Mechanics* logo also have been added.

HEADQUARTERS

Wal-Mart Stores/702 S.W. Eighth St./Bentonville, Ark. 72716/Phone: (501) 273-4000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Paul Higham, vp-mktg; Barbara Brown, dir-sales promo; Randy Parker, dir-print media; Mike Baron, dir-print prodn; Bob McCurry, dir-store signing; Jim Scibetta, dir-package design.

Wal-Mart Stores: Bernstein-Rein Advertising, Kansas City, Mo. Skip Rein, exec vp. GSD&M, Austin, Texas. Betsy Martin, acct exec.

RANK: 11

Warner-Lambert Co.

Morris Plains, N.J.
Ad spending: **$656.5** million

U.S. AD SPENDING ($ in thousands)

By media	1991	1990	% chg
Magazine	18,047	21,646	-16.6
Sunday magazine	0	28	NA
Newspaper	141	269	-47.6
Outdoor	265	995	-73.4
Network TV	84,059	91,115	-7.7
Spot TV	37,678	37,403	0.7
Syndicated TV	65,073	48,434	34.4
Cable TV networks	4,120	4,730	-13.1
Network radio	14,564	11,582	25.7
Spot radio	600	348	72.4
Measured media	224,546	216,559	3.7
Unmeasured	432,000	416,600	3.7
Total	656,546	633,159	3.7
By top brands	**1991**	**1990**	**% chg**
Benadryl allergy relief products	24,138	26,954	-10.4
Listerine mouthwash	23,236	20,328	14.3
Trident gum & mints	19,338	20,048	-3.5
Rolaids antacid	19,311	16,887	14.3
Schick shaving products	17,384	7,770	123.7
Medi-Flu medicine	14,542	7,918	83.7
Halls	13,473	8,560	57.4
Dentyne gum & mints	13,037	11,084	17.6
Certs mints	11,754	18,236	-35.5
Lubriderm lotions	11,687	10,298	13.5

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	5,059	4,687	7.9
Earnings	35	485	-92.8
U.S.	**1991**	**1990**	**% chg**
Sales	2,615	2,445	7.0
Operating profit	723	734	-1.5
Division sales	**1991**	**1990**	**% chg**
Pharmaceutical	2,014	1,717	17.3
Consumer healthcare	1,960	1,916	2.3
Confectionery	1,085	1,054	2.9

CORPORATE PROFILE

Warner-Lambert Co. fortified its consumer healthcare business this year by introducing Nicotrol in the burgeoning smoking-cessation market.

The patch accompanies four other new-product introductions within the past year by Warner-Lambert—Soothers throat drops, the Schick Tracer razor system, new skincare products under the Lubriderm name and Dentyne Cinn-A-burst gum—that should boost lagging sales.

Warner-Lambert's consumer healthcare products are its most heavily advertised, and they contributed 39% of the company's total revenues in 1991, second only to pharmaceuticals at 40%. The segment's sales, however, have been sluggish, growing only 2.3% in 1991 vs. 17.3% on the pharmaceutical side.

The Nicotrol patch from Warner-Lambert's Parke-Davis division enters the most rapidly growing market category in the U.S. Annual category sales could reach $1.2 billion by yearend when the ad spending tally of the major category players could reach a collective $100 million in media.

Nicotrol didn't enter the market until midyear, losing out on the early frenzy. Its distinctiveness may make up for the belated entry. Unlike other patches it is designed for 16-hour rather than 24-hour use. This provides temporary relief of symptoms often associated with the patches—insomnia, bad dreams and nausea.

Warner-Lambert should carve out a 10% share in the market this year, according to Arvaid Desai, senior analyst at Mehta & Isaly, New York, who places Ciba-Geigy's Habitrol as the big winner likely to claim up to 55% of market for the full year. Marion Merrell Dow's Nicoderm will grab about 38%.

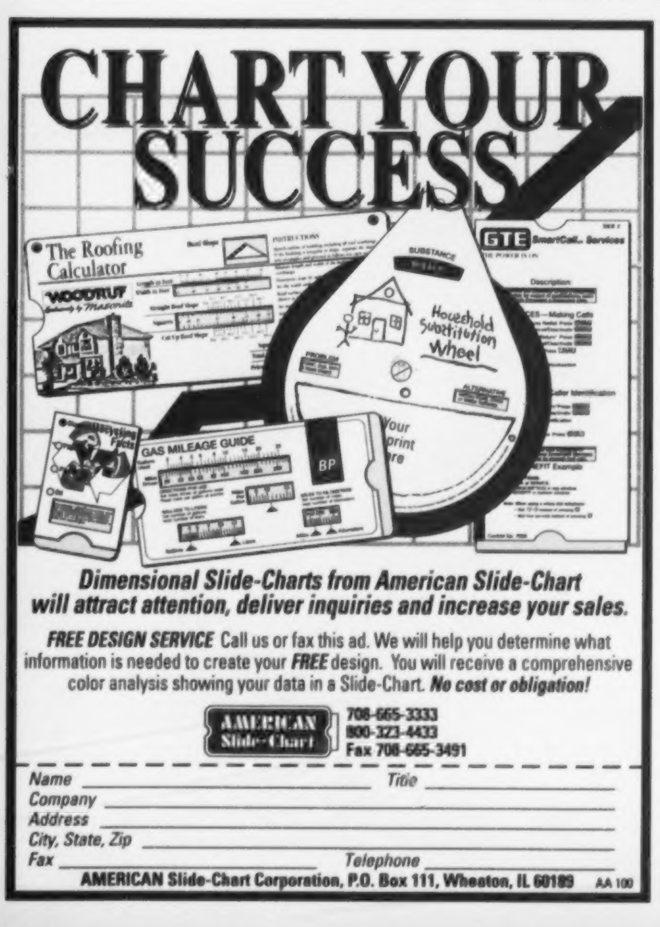
Benadryl, one of Warner-Lambert's stronger performers, drew media support in 1991 of $24.1 million, down 10.4%, according to LNA/Arbitron Multi-Media Service. Last July, the company began running print ads for Benadryl that tried to capitalize on a controversy affecting Seldane, a competing allergy remedy. The FDA reported that Seldane, marketed by Marion Merrell Dow, can cause life-threatening side effects when used in combination with certain antibiotics. Benadryl touted its position as being the "dependable" remedy for allergies.

Warner-Lambert in 1992 introduced an allergy/sinus extension of the brand. Benadryl commands 5.6% of the $2.02 billion cough-cold-allergy-sinus category; the company overall has an 8.4% share of category, ranking it fifth.

Warner-Lambert late last year rolled national with Cool Mint Listerine, a formula that couples the therapeutic, antigingivitis benefits of regular Listerine with a mint taste. Listerine, the No. 1 mouthwash with a 30% share of the $800 million category, was backed with $23.5 million in media, LNA noted.

In early 1991, the company introduced Tracer, its answer to Gillette Co.'s Sensor, which got a year's head start. It was supported with $15 million in measured media.

The company entered the $3.1 billion facial skincare market in 1992 with Lubriderm One Step, an extension of its Lubriderm moisturizer. Both Lubriderm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100 Leaders by most-advertised segment

			U.S. ad spending		U.S. sales		Sales per ad dollar		Worldwide (1991)		% return
Most-advertised segment	Rank	Advertiser	1991	1990	1991	1990	1991	1990	Sales	Earnings	on sales
AIRLINE	67	AMR Corp.	$150	$143	$10,187	$10,020	$67.88	$70.29	$12,887	($240)	-1.9
	63	Delta Air Lines	164	127	10,837	9,171	65.89	72.39	10,837	(506)	-4.7
	93	UAL Corp.	119	124	7,793	8,028	65.39	64.65	11,663	(332)	-2.8
APPAREL	78	Levi Strauss & Co.	129	159	2,982	NA	23.05	NA	4,900	348	7.1
	45	Nike Inc.	223	179	2,271	2,142	10.17	11.98	3,405	329	9.7
	84	Reebok International	126	81	1,883	1,655	14.88	20.43	2,734	235	8.6
AUTOMOTIVE	20	Chrysler Corp.	531	529	24,537	26,887	46.20	50.87	29,370	(795)	-2.7
	88	Daimler-Benz AG	122	125	7,274	7,432	59.63	59.46	57,639	1,178	2.0
	9	Ford Motor Co.	677	615	61,149	69,912	90.38	113.66	88,286	(2,258)	-2.6
	3	General Motors Corp.	1,442	1,503	83,973	86,967	58.23	57.86	123,056	4,453	3.6
	31	Honda Motor Co.	333	318	15,144	13,964	45.47	43.91	33,059	488	1.5
	91	Hyundai Group	120	135	NA	NA	NA	NA	38,500	NA	NA
	48	Mazda Motor Corp.	215	248	NA	NA	NA	NA	NA	NA	NA
	37	Nissan Motor Co.	269	410	NA	NA	NA	NA	48,263	762	1.6
	12	Toyota Motor Corp.	632	581	NA	NA	NA	NA	81,307	1,903	2.3
BEER, WINE & LIQUOR	22	Anheuser-Busch Cos.	508	459	12,634	11,612	24.85	25.30	12,634	940	7.4
	52	Adolph Coors Co.	207	195	1,917	1,839	9.27	9.44	1,917	26	1.3
	85	Seagram Co.	126	135	2,876	2,779	22.77	20.55	6,345	727	11.5
CANDY & GUM	32	Hershey Foods Corp.	299	302	2,566	2,509	8.59	8.31	2,899	220	7.6
	38	Mars Inc.	254	272	5,000	NA	19.69	NA	11,000	NA	NA
	86	Wm. Wrigley Jr. Co.	125	129	718	715	5.73	5.53	1,149	129	11.2
CIGARETTES	47	American Brands	218	227	5,077	4,686	23.34	20.61	14,064	806	5.7
	97	B.A.T Industries	113	83	8,155	7,452	72.19	90.14	29,285	732	2.5
	79	Loews Corp.	129	186	13,620	12,637	105.62	67.80	13,620	904	6.6
	18	RJR Nabisco	571	636	12,548	12,125	21.97	19.06	14,989	368	2.5
ELECTRONICS & APPLIANCES	94	Canon Inc.	118	119	4,349	3,820	36.99	31.97	14,951	417	2.8
	33	Matsushita Electric Industrial Co.	292	332	NA	5,400	NA	16.26	56,015	999	1.8
	73	Philips NV	133	178	7,443	6,973	55.90	39.24	33,052	697	2.1
	25	Sony Corp.	439	412	8,337	7,475	19.01	18.14	28,734	903	3.1
ENTERTAINMENT & MEDIA	23	Walt Disney Co.	489	436	4,882	4,792	9.98	10.99	6,182	637	10.3
	55	General Electric Co.	199	236	52,812	51,270	265.64	217.43	60,236	2,636	4.4
	72	News Corp.	136	128	4,964	5,143	36.57	40.20	7,810	385	4.9
	60	Paramount Communications	179	161	3,505	3,260	19.53	20.25	3,895	122	3.1
	16	Time Warner	588	681	8,862	8,550	15.08	12.56	12,021	(99)	-0.8
FOOD	64	Campbell Soup Co.	164	175	4,678	4,484	28.52	25.58	6,263	491	7.8
	40	ConAgra	250	247	21,219	20,177	84.96	81.81	21,219	372	1.8
	75	CPC International	131	137	2,309	2,322	17.57	16.95	6,189	373	6.0
	19	General Mills	556	539	7,040	6,377	12.67	11.83	7,778	496	6.4
	26	H.J. Heinz Co.	403	308	3,848	3,863	9.55	12.54	6,582	638	9.7
	17	Kellogg Co.	578	578	3,411	3,044	5.90	5.27	5,787	606	10.5
	100	Monsanto Co.	101	115	5,636	5,685	55.92	49.50	8,864	296	3.3
	14	Nestle SA	601	639	8,098	7,533	13.48	11.79	36,321	1,777	4.9
	2	Philip Morris Cos.	2,046	2,218	37,890	36,014	18.52	16.24	56,458	3,006	5.3
	41	Quaker Oats Co.	238	268	3,842	3,860	16.16	14.39	5,576	248	4.4
	27	Ralston Purina Co.	394	355	5,210	5,084	13.24	14.34	7,376	392	5.3
	36	Sara Lee Corp.	273	309	NA	NA	NA	NA	13,243	761	5.7
	62	U.S. dairy farmers	168	177	NA	NA	NA	NA	NA	NA	NA
HOTELS	68	ITT Corp.	141	161	14,111	14,106	99.74	87.51	20,421	817	4.0
	69	Marriott Corp.	140	140	8,331	7,646	59.63	54.77	8,331	82	1.0
HOUSEHOLD PRODUCTS	58	Clorox Co.	183	173	NA	NA	NA	NA	1,717	99	5.7
	82	Dow Chemical Co.	127	143	9,079	9,494	71.45	66.54	18,807	935	5.0
	61	S.C. Johnson & Son	174	169	NA	NA	NA	NA	3,300	NA	NA
MISCELLANEOUS	44	American Express Co.	226	218	21,024	19,459	92.85	89.40	25,763	789	3.1
	10	Eastman Kodak Co.	661	625	10,882	10,663	16.45	17.05	19,419	17	0.1
	77	Goodyear Tire & Rubber Co.	131	179	6,231	6,460	47.69	36.15	10,907	97	0.9
	89	Hallmark Cards	122	147	2,500	2,500	20.52	17.03	2,500	NA	NA
	54	Hasbro Inc.	201	195	1,273	939	6.32	4.81	2,141	82	3.8
	90	Mobil Corp.	120	140	20,006	21,006	166.66	149.77	63,227	1,920	3.0
	39	U.S. Government	253	305	NA	NA	NA	NA	NA	NA	NA
PERSONAL CARE	42	Colgate-Palmolive Co.	227	287	2,196	2,059	9.65	7.17	6,061	125	2.1
	59	Gillette Co.	182	155	1,496	1,433	8.20	9.22	4,684	427	9.1
	65	Helene Curtis Industries	157	145	733	640	4.65	4.40	1,020	19	1.9
	98	Kimberly-Clark Corp.	108	104	5,422	5,094	50.33	48.91	5,777	508	8.8
	1	Procter & Gamble Co.	2,149	2,277	15,600	15,276	7.26	6.71	29,400	1,870	6.4
	80	Revlon Group	128	143	928	921	7.25	6.42	1,476	(414)	-28.1
	15	Unilever NV	594	569	8,475	8,195	14.27	14.40	41,161	2,049	5.0
PHARMACEUTICALS, REMEDIES & DIETS	99	American Cyanamid Co.	105	64	3,057	2,762	29.07	42.88	4,986	359	7.2
	24	American Home Products Corp.	447	415	4,878	4,608	10.91	11.09	7,079	1,375	19.4
	30	Bristol-Myers Squibb Co.	352	429	7,686	7,017	21.81	16.37	11,159	2,056	18.4
	95	Ciba-Geigy	115	110	4,247	4,044	36.81	36.82	15,903	386	2.4
	7	Johnson & Johnson	733	603	6,248	5,427	8.52	9.00	12,447	1,461	11.7
	56	Schering-Plough Corp.	198	201	2,118	1,890	10.67	9.40	3,616	646	17.9
	51	SmithKline Beecham	208	191	4,859	5,013	23.32	26.22	8,325	711	8.5
	71	Thompson Medical/Slim-Fast Food Cos.	137	133	NA	NA	NA	NA	NA	NA	NA
	92	Upjohn Co.	119	119	2,609	2,248	21.88	18.86	3,402	537	15.8
	11	Warner-Lambert Co.	657	633	2,615	2,445	3.98	3.86	5,059	35	0.7
RESTAURANTS	6	Grand Metropolitan	745	883	7,878	8,025	10.58	9.09	15,545	1,711	11.0
	8	McDonald's Corp.	695	765	3,710	3,871	5.34	5.06	6,695	860	12.8
	5	PepsiCo	903	855	15,168	14,047	16.79	16.43	19,608	1,080	5.5
	87	Wendy's International	124	120	1,060	1,011	8.54	8.44	1,060	51	4.8
RETAILERS	53	American Stores Co.	202	205	20,823	22,156	103.29	107.86	20,823	199	1.0
	66	Carter Hawley Hale Stores	152	157	2,128	2,533	14.01	16.09	2,128	(217)	-10.2
	49	Circuit City Stores	214	153	2,790	2,367	13.06	15.47	2,790	78	2.8
	43	Dayton Hudson Corp.	226	319	16,115	14,739	71.15	46.20	16,115	301	1.9
	46	Federated Department Stores	223	252	6,932	7,142	31.12	28.39	6,932	836	12.1
	21	Kmart Corp.	527	564	33,520	30,971	63.58	54.94	34,580	859	2.5
	34	R.H. Macy & Co.	289	272	6,762	7,267	23.36	26.70	6,762	(150)	-2.2
	35	May Department Stores Co.	277	372	10,402	9,857	37.51	26.52	10,402	515	5.0
	83	Montgomery Ward & Co.	127	206	5,600	5,500	44.19	26.75	5,600	NA	NA
	29	J.C. Penney Co.	363	394	17,295	17,410	47.70	44.20	17,295	80	0.5
	4	Sears, Roebuck & Co.	1,179	1,508	57,242	55,972	48.53	37.12	57,242	1,279	2.2
	50	Tandy Corp.	213	233	4,680	4,562	21.94	19.61	4,680	184	3.9
	96	U.S. Shoe Corp.	113	121	2,726	2,719	24.07	22.53	2,726	31	1.1
	57	Wal-Mart Stores	190	152	43,887	32,602	231.18	214.66	43,887	1,608	3.7
SOFT DRINKS	28	Coca-Cola Co.	367	377	4,125	3,931	11.23	10.42	11,572	1,618	14.0
	74	Dr Pepper/Seven-Up Cos.	131	111	601	540	4.57	4.89	601	(20)	-3.3
TELEPHONE	13	AT&T Co.	617	799	63,089	62,191	102.20	77.87	63,089	522	0.8
	81	Bell Atlantic Corp.	128	135	12,280	12,298	96.27	91.28	12,280	(223)	-1.8
	70	MCI Communications Corp.	139	83	8,433	7,680	60.47	93.00	8,433	551	6.5
	76	Sprint Corp.	131	155	8,780	8,345	66.82	53.72	8,780	368	4.2

Notes: Dollars are in millions, except sales per ad dollar, which are as shown. Advertising figures are AA estimates. Sales and earnings from public documents. See Page 72 for sources and methodology.

AA Chart: Kevin Brown

National ad spending by media

	100 Leading National Advertisers					All U.S. advertising expenditures						
	Advertising expenditures			Media as % of total		Advertising expenditures			Media as % of total		Coen's U.S. totals	
Category	1991	1990	% chg	1991	1990	1991	1990	% chg	1991	1990	1991	1990
Magazine	$2,794.3	$2,884.2	-3.1	8.3	8.2	$6,515.2	$6,737.7	-3.3	5.2	5.2	$6,739.0	$7,018.0
Sunday magazines	245.2	247.1	-0.8	0.7	0.7	794.0	777.1	2.2	0.6	0.6	NA	NA
Newspaper	1,511.3	1,938.1	-22.0	4.5	5.5	6,837.3	8,901.9	-23.2	5.4	6.9	30,409.0	32,281.0
Outdoor	284.2	276.1	2.9	0.8	0.8	684.0	688.8	-0.7	0.5	0.5	1,077.0	1,084.0
Network TV	7,162.7	7,826.8	-8.5	21.3	22.4	9,456.2	10,132.3	-6.7	7.5	7.9	8,933.0	9,383.0
Spot TV	3,774.5	3,861.1	-2.2	11.2	11.0	8,751.2	9,293.3	-5.8	6.9	7.2	14,675.0	15,644.0
Syndicated TV	1,440.4	1,269.5	13.5	4.3	3.6	1,850.4	1,587.6	16.6	1.5	1.2	1,853.0	1,589.0
Cable TV	708.5	623.5	13.6	2.1	1.8	1,211.6	1,110.2	9.1	1.0	0.9	1,941.0	1,789.0
Network radio	303.1	375.9	-19.4	0.9	1.1	578.7	766.4	-24.5	0.5	0.6	490.0	482.0
Spot radio	391.2	391.1	0.0	1.2	1.1	1,141.6	1,168.4	-2.3	0.9	0.9	7,986.0	8,244.0
Measured media subtotal	18,615.4	19,693.5	-5.5	55.3	56.2	37,820.2	41,136.6	-8.1	29.9	32.0	74,103.0	77,514.0
Estimated unmeasured	15,036.7	15,318.6	-1.8	44.7	43.8	88,579.8	87,503.4	1.2	70.1	68.0	52,297.0	51,126.0
Total U.S. advertising	33,652.1	35,012.1	-3.9	100.0	100.0	126,400.0	128,640.0	-1.7	100.0	100.0	126,400.0	128,640.0

Notes: Dollars are in millions. **Sources:** LNA/Arbitron, Robert J. Coen, McCann-Erickson Worldwide (AA, May 4). See Page 72 for methodology.

products are backed with a combined $35 million media budget in 1992. Lubriderm is No. 4 in the $488.6 million hand and body moisturizer market with a 9.9% share, versus 21.1% for Unilever's leading Vaseline Intensive Care, 13.5% for Andrew Jergens Co.'s Jergens, and 12.7% for Beiersdorf's Nivea, according to Towne-Oller & Associates.

Lubriderm is the first of the rivals to enter the mass-market facial cleansing and moisturizing categories. Facial moisturizers are a $520 million category, led by Procter & Gamble Co.'s Oil of Olay with a 20% share, and L'Oreal's Plenitude with an 11.5% share. The $300 million facial cleansing category is led by P&G's Noxzema with a 28% share and No. 2 Pond's from Unilever with a 13% share.

The company's American Chicle Group, hurt by too few line extensions and a slowdown in ad spending, particularly behind Dentyne, saw dollar sales drop 1%, to $310.7 million, on a 7% decrease in unit sales in 1991, Nielsen Marketing Research reported. The No. 2 gum marketer backed Dentyne with $12 million in media advertising, but dollar volume slipped 1% to $67.6 million as unit volume fell 6%, according to Nielsen. Chicle's rebuilding plan includes new-product rollouts, starting with the Dentyne line extension Cinn-A-Burst introduced nationally in 1991.

The product is designed to appeal to teens and is supported by network TV and radio campaign themed, "May not be suitable for adults."

Chicle also is said to be planning a national launch of Cristal, a sugarless gum that won't stick to dentures, and is competitive with Wm. Wrigley Jr. Co.'s sugarless Freedent.

Trident, Chicle's best seller, posted 1991 sales of $143.3 million, up 3.4%, though unit sales fell 2.9%. Trident was backed with close to $20 million in measured spending, unchanged from 1990.

Warner-Lambert's 92.8% decline in net income was largely the result of a one-time, after-tax charge of $524 million against earnings in the fourth quarter relating to restructuring worldwide operations. Plant consolidation and staff reductions were included in the restructuring. Excluding the onetime charge, earnings per share rose 15%.

HEADQUARTERS

Warner-Lambert Co./201 Tabor Road/Morris Plains, N.J. 07950/Phone: (201) 540-2000.

PERSONNEL, BRANDS, AGENCIES

AMERICAN CHICLE GROUP DIV: 201 Tabor Road/Morris Plains, N.J. 07950/Phone: (201) 540-2000. Keith Buchanan, vp-sales; Michael Soriano, vp-mkgt/sales svcs.

Trident, Clorets, Bubblicious, Halls, Halls Plus, Soothers: J. Walter Thompson USA, New York. Jack Morrissey, sr vp-mgmt dir.

Rolaids, Certs, Sugar-Certs, Sugar-Free Certs Mini-Mints, Dentyne, Sugar-Free Dentyne, Junior Mints, Cinn-A-Burst, Fazer Mints: Young & Rubicam, New York. Arlene Brickner, sr vp-grp dir.

CONSUMER HEALTH PRODUCTS GROUP: 201 Tabor Road/Morris Plains, N.J. 07950/Phone: (201) 540-2000. Joseph W. Masse, vp-sales; Russ Moran, vp-prod mgmt.

Listerine, Listermint With Flouride, Cool Mint Listerine, Lubriderm, Lubriderm Body Bar, Lubriderm One Step Cleansers, Sinutab, e.p.t. Anusol, Personal Touch shaving products, Schick shaving products, Medi-Flu: J. Walter Thompson USA, New York. Jack Morrissey, sr vp-mgmt dir.

Efferdent: Young & Rubicam, New York. Arlene Brickner, sr vp-grp dir.

Consumer & professional adv: Benylin, Benadryl oral, Benadryl topical, Tucks, Caladryl, Nicotrol, new products. Anusol-professional adv: Sudler & Hennessey, New York. Arthur M. Rosen, exec vp-mg dir, consumer adv; Donald Masterson, exec vp-grp dir, professional adv.

RANK: 87

Wendy's International

Dublin, Ohio

Ad spending: **$124.1** million

U.S. AD SPENDING ($ in thousands)

By media	**1991**	**1990**	**% chg**
Magazine	5	15	-69.2
Sunday magazine	0	17	NA
Newspaper	0	27	NA
Outdoor	1,915	1,570	22.0
Network TV	41,954	40,305	4.1
Spot TV	39,518	37,069	6.6
Syndicated TV	8,424	8,342	1.0
Cable TV networks	2,386	3,361	-29.0
Spot radio	215	388	-44.7
Measured media	94,416	91,093	3.6
Unmeasured	29,700	28,700	3.5
Total	124,116	119,793	3.6

SALES & EARNINGS ($ in millions)

Worldwide	**1991**	**1990**	**% chg**
Sales	1,060	1,011	4.9
Earnings	51	39	30.6
Division sales	**1991**	**1990**	**% chg**
Retail sales	963	922	4.4
Royalties	86	80	6.9
Other	12	9	36.7
Systemwide results	**1991**	**1990**	**% chg**
Company-operated restaurants	963	922	4.4
Franchisees	2,261	2,148	5.3
Total systemwide sales	3,224	3,070	5.0

CORPORATE PROFILE

Wendy's International has bounced back from a late 1980s slump.

While other quick-service restaurant chains struggled to stay above the recessionary waters, Wendy's reported a remarkable year. Average store sales last year rose 5% to $852,000, nearly double the 2.8% increase logged in 1990.

Wendy's has surged while its rivals faltered, in part because it didn't panic. It hasn't fired its ad agency, changed its ad theme or spokesman, hasn't tested pineapple pizza or chicken on a stick. It identified its strengths and has stayed true to them.

Chief among its strengths is founder and Senior Chairman R. David Thomas, brought back from retirement in 1989 to be ad spokesman. Three years and 100 commercials later, he's still going strong. Wendy's consumer tracking shows the Dave Thomas ad campaign to have an 80% awareness ranking, surpassing its previous high of 75% with the earlier Clara Peller "Where's the beef?" ads.

Wendy's other strength has been its core menu of hamburgers and chicken. New items were added, some as limited-time promotions and some permanently, in 1991, but Wendy's kept its balance: a Chicken Cordon Bleu sandwich was followed by a Bacon Mushroom Melt burger in the first half of the year; a Grilled Chicken sandwich was followed by the return of the Dave's Deluxe burger in the second.

The company didn't respond to consumer price-sensitivity by returning to the couponing it had largely abandoned in 1990, but Wendy's did feature more prominently its Super Value Menu, a selection of items priced at 99¢.

Wendy's raised media spending only slightly, to $94.4 million, up 3.6%, and didn't significantly alter its ad mix. Outdoor and network, spot, cable and syndicated TV continued to share the budgets with the same shares as in 1990.

Wendy's one major change in both menu and marketing came in May 1992 when it launched its first line of packaged salads, called Wendy's Fresh Salads. In addition to using network and spot TV to support the introduction, Wendy's made its first major magazine buy in five years.

One area Wendy's has downplayed in recent years has been overseas expansion. Only 316 of its 3,804 stores are outside the U.S., and 148 of those are in Canada. Wendy's plans to open 75 stores outside the U.S. in 1992 and give more attention through the decade to becoming a global brand.

HEADQUARTERS

Wendy's International/4288 W. Dublin/Granville Road/P.O. Box 256/Dublin, Ohio 43017-0256/Phone: (614) 764-3100.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Charles Rath, exec vp-mktg; Emil Brolick, vp-strategic planning/rsch; Don Calhoon, vp-corp mktg; Denny Lynch, vp-comms; Tom Hescamp, Tom Krouse, Bill Long, Bob Stowe, brand mktg dirs.

Advertising: Backer Spielvogel Bates Worldwide, New York. Gary Steele, exec vp-acct dir.

Sales promo: Impact, Chicago. Tom Smart, acct dir.

Public relations: Ketchum Public Relations, Chicago. Keith Burton, acct dir.

RANK: 86

Wm. Wrigley Jr. Co.

Chicago

Ad spending: **$125.4** million

U.S. AD SPENDING ($ in thousands)

By media	**1991**	**1990**	**% chg**
Magazine	7,605	4,879	55.9
Sunday magazine	37	1,266	-97.1
Outdoor	901	1,010	-10.7
Network TV	35,765	42,394	-15.6
Spot TV	22,998	31,498	-27.0
Syndicated TV	25,634	23,295	10.0
Cable TV networks	13,931	10,223	36.3
Network radio	3,807	3,713	2.5
Spot radio	971	43	NA
Measured media	111,649	118,321	-5.6
Unmeasured	13,800	10,800	27.8
Total	125,449	129,121	-2.8

SALES & EARNINGS ($ in millions)

Worldwide	**1991**	**1990**	**% chg**
Sales	1,149	1,111	3.4
Earnings	129	117	9.6

CORPORATE PROFILE

Wm. Wrigley Jr. Co. managed to boost its unit volume and dollar sales in the U.S. last year while spending less on advertising.

Wrigley's growth strengthened its leading position in the $1.3 billion U.S. gum market to a 48% share compared to 23.4% for Warner-Lambert Co.'s American Chicle Group, according to Nielsen Marketing Research.

Wrigley's total U.S. advertising/marketing expenditures dropped 2.8% to $125.4 million, representing about 75% of the company's worldwide total. Although ad exposure was down on the company's two top-spending brands, Extra and Doublemint, it wasn't for Spearmint, which is riding a new "smoker's alternative" ad campaign.

Extra claimed $27.6 million, down slightly from 1990; Doublemint drew $24.3 million, down 11.6%; Spearmint got $22.6 million, up 9.2%, according to LNA/Arbitron Multi-Media Service.

Sugar-free gums were big contributors to the company's 3.4% growth in worldwide sales, particularly outside the U.S. as Wrigley actively marketed in Europe.

Sugar-free Extra, which has become the company's No. 1 brand, joined Orbit sugar-free gum as a top seller overseas. Wrigley's non-U.S. sales volume outgrew U.S. sales 3% to 2%.

Domestic sales growth of Extra slowed in 1991, Wrigley said, primarily because there was no new flavor to promote.

Sugared gums got a sales boost from the 25¢, five-stick packs and the 10-unit multipacks. The company credits that "value pricing" with producing U.S. volume increases of 2% in sugared brands.

Among other brands, Juicy Fruit and Big Red gums saw decreased spending; Freedent was up 23% to $10.1 million.

HEADQUARTERS

Wm. Wrigley Jr. Co./410 N. Michigan Ave./Chicago, Ill. 60611/Phone: (312) 644-2121.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Douglas S. Barrie, grp vp-intl; Ronald O. Cox, grp vp-mktg; Anthony Cipollina, vp-sales; Gary Beebe, Susan Fox, asst vps-mktg.

Wrigley's gums: BBDO, Chicago. Tonise Paul, sr vp-mgmt super.

AMUROL PRODUCTS CO.: Amurol Products Co./1100 E. Chicago Ave./Naperville, Ill. 60540/P.O. Box 3026/Naperville, Ill. 60566/Phone: (708) 355-3000. A.G. Atwater, pres.

Amurol products: Leo Burnett USA, Chicago. John Kovas, acct dir.

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Top 100 take it on the chin

(Continued from Page 1)

losing steam as the favored method of hyping sales.

In the first quarter, both P&G and the Kraft General Foods unit of PM moved to provide everyday low pricing by cutting prices they charged grocers on some products and lowering spending on promotional efforts, including slotting allowances. Both trimmed their media outlays in the quarter, down 8.1% at P&G and 20% at PM.

Nevertheless, media are reviving somewhat from 1991's heavily depressed state. In the first quarter, media grew an aggregate 2.6% (newspapers not included due to new collecting procedures in '92).

Retailers bailed out of newspapers in 1991 as the top four spenders registered double-digit declines, paced by leader May Department Stores Co., No. 35, at $155.2 million, down 28.9%. The Top 100 contributed 22% of LNA/Arbitron's newspaper ad total of $6.84 billion, down 23.2%.

Food companies, major spenders in network and spot TV and feeling a certain coolness to their brands, sought relief by slashing spending in those two media by 13.2% and 5%, respectively, and shifting media dollars into promotion. Among the Top 100 food marketers, media dropped a collective 2.7% as unmeasured rose 2.8%.

Food sales growth was negligible. In U.S. and/or North American sales, CPC International, No. 75, dropped 0.6%; H.J. Heinz Co., No. 26, fell 3.9%; and No. 41 Quaker Oats dropped 0.5%. Philip Morris gained 0.9%. Sara Lee Corp., No. 36, plunged 6.2% in food sales worldwide.

New product growth, particularly among food companies, also was frustrated by the recession. Total new products for the group hit 1,251 for the year, down 4.5% from 1990, according to *New Product News*.

Most activity was in line extensions as marketers concocted new flavors and varieties from existing brands. Particularly adept at this gambit were No. 40 ConAgra and No. 64 Campbell Soup Co. ConAgra introduced 183 new products, up 20%, most of those extending the Healthy Choice brand to spaghetti sauces, lunch meats, cheeses, soups and even ground beef. Campbell Soup brought to market 114 new products, down 12% from 1990. It expanded its Healthy Request line of fat-free soups and extended the brand to spaghetti sauces with reduced sodium and fat.

Auto marketers fared much worse as consumers put off making big-ticket purchases. General Motors and No. 9 Ford Motor Co. suffered their biggest losses ever. In U.S. sales, GM was down 3.4% and Ford 12.5%. Chrysler Corp., No. 20, suffered an overall loss and a decline in U.S. sales of 8.7% as the company gave up the third spot in U.S. unit car sales to Toyota Motor Corp., No. 12.

U.S. sales of the Top 100 auto marketers reporting such a geographic breakout declined 6.4% as their ad expenditures remained flat. The category generated $60.51 in sales per ad dollar in 1991 vs. $65.00 in 1990, a decline of 6.9%.

The full-price side of the cigarette market took a beating in 1991 as the market's other sector, value-price brands (including generics), increased 27% in volume and 5.8 share points to a 25 share of the total market, according to John C. Maxwell Jr. of Wheat, First Securities. The full-price brands dropped 9.3% in unit volume and influenced a decline of 2.4% in the overall market.

Media spending declined 15% to $477.2 million in the cigarette category monitored by LNA/Arbitron. Virtually all category players are Top 100 companies. The decline reflects lower budgets across full-price and value-price lines and a lack of new products to stimulate category spending.

The hotel industry launched its own version of the airlines' special discount rockets. No. 68 ITT Corp.'s Sheraton unit introduced a Super-Saver campaign this spring that included non-refundable advance booking and frequency discounts. It followed a similar program at No. 69 Marriott Corp.

Both were responding to the increased air traffic that resulted from the rate-slashing programs No. 67 AMR Corp.'s American Airlines helped touch off this spring. The American message was aimed at bringing value back to the business.

During 1991, the two hoteliers slashed their ad spending by a collective 6.5%, perhaps relying on their airline cousins to generate traffic. Sales were up 5.9% among airlines in the Top 100, stimulated by a 10.3% growth in advertising. However, as each suffered deep losses and resorted to rate-slashing this year to generate traffic, they ended up, ironically, putting still more strain on the bottom line.

One of the few Top 100 media categories to register a year-to-year gain in advertising was pharmaceuticals, remedies and diets. There, ad spending rose 6% as sales rose 8%. The Rx-to-OTC movement of products, in particular, invigorated media spending, but so, too, did the advertising of ethical drugs—a brave new territory for pharmaceutical companies because of complexities in advertising prescription drugs.

Rogaine, the pharmaceutical product for pattern baldness, drew $33 million in advertising to keep No. 92 Upjohn Co. among the 100 Leaders for the second consecutive year. Most spending was on network TV where product name and indication cannot be mentioned in the same spot. In first quarter 1992, Upjohn introduced Rogaine for women with an estimated $20 million campaign.

Monistat 7, the vaginal yeast cream taken over-the-counter in 1991 by Johnson & Johnson, funneled $42.3 million into media in its first full year on the consumer market. Not far behind was Gyne-Lotrimin cream, an ethical-turned-OTC product from No. 56 Schering-Plough Corp., with $33 million behind it.

Brand-building promoted growth in the $2.02 billion cough/cold/allergy/sinus market where four product extensions were added each to No. 24 American Home Products Corp.'s Robitussin line and No. 7 Johnson & Johnson's Tylenol brand. Media outlays rose 71.4% to $36.1 million for Robitussin and 28.7% to $54.7 million for Tylenol, the two heaviest advertisers in a category that drew $473.9 million in total media, up 11.3%, according to LNA/Arbitron.

Vietnam War era was last time Top 100 slid

The only previous year-to-year decline in ad spending by the 100 Leading National Advertisers was in 1970, when spending declined 0.6% to $4.62 billion, Richard Nixon was in the White House and the big news was the Vietnam conflict.

Procter & Gamble Co. was the No. 1 advertiser that year at $265 million, down 3.6% from 1969. Thirty of that year's Top 100 marketers cut spending, compared with 59 in 1991.

Prior to that year, the closest the Top 100 came to negative ad growth was in 1967 when spending totals reached $4.54 billion, up only 1.6% from 1966. ☐

In the $2.3 billion pain-reliever market, where brands have been extended to the hilt, the top 10 advertised brands number 56 varieties. Tylenol, an acetaminophen, still dominates in media spending at $93.4 million and market share at 33.4%. Segment growth has swung from aspirins (38.4% of market) to acetaminophens (38.8%) and ibuprofens (22.8%). Most aspirin brands have crossed over to include either ibuprofen or acetaminophen extensions. Famous old Bayer aspirin, from the Sterling Winthrop unit of No. 10 Eastman Kodak Co., has been one of the last holdouts, but even it will add a non-aspirin line in 1993.

A battle *royale* is brewing in the antihistamine-decongestant market where last month Sandoz Pharmaceuticals Co.'s Tavist-1 and Tavist-D, both ethical drugs, got FDA approval to go OTC. FDA application of competitor Seldane from No. 82 Dow Chemical Co.'s Marion Merrell Dow was delayed when the FDA required new labeling for Seldane, the prescription antihistamine that controls 70% of that market. Sandoz is not wasting time; it is preparing a $45 million launch.

Spending levels in 1991 did not reflect a hot new market category that emerged the beginning of this year—smoking cessation patches. This market is expected to hit $1 billion to $1.2 billion by the close of the year, according to industry analyst Arvaid Desai, senior analyst with Mehta & Isaly.

Habitrol, market leader from No. 95 Ciba Geigy, is seen at a 50% to 55% share by yearend, or about $600 million in sales—the largest first-year sales of any pharmaceutical product, he said. Marion Merrell Dow's Nicoderm, first out of the blocks but unable to keep up with demand, is now second to Habitrol. No. 99 American Cyanamid's ProStep entered the market in March, and No. 11 Warner-Lambert's Nicotol came in at midyear. Both are expected to reach about 10% of market this year.

Spending in the category should climb to $100 million this year in consumer media, an ad channel for ethical drugs only approved this summer by the American Medical Association. ☐

Methodology for ranking the 100 top advertisers

The 100 Leading National Advertisers, selected from the 200 largest advertisers based on measured U.S. ad spending (see below) in calendar 1991, are ranked by the sum of their measured *and* unmeasured spending.

Media & monitoring services

Media in this report refers to ad expenditures in national consumer media monitored by LNA/Arbitron Multi-Media Service.

The media breakouts labeled "U.S. ad spending" at the beginning of each company profile were provided by LNA/Arbitron. References to media spending in virtually all cases refer to numbers from LNA/Arbitron.

Ten measured media

Newspaper: LNA Newspaper measures ad space in 66 cities using one-time open inch rates. Expenditures for general and automotive (which LNA considers national) are projected to 125 markets. Financial and retail spending are not projected.

Magazines/Sunday magazines: PIB/LNA Magazines applies gross one-time rates to all paid advertising in 177 consumer magazines and four Sunday magazines.

Outdoor: LNA Outdoor data include poster and paint outdoor board revenues in more than 200 plant operator markets.

Network TV: Arbitron's MediaWatch monitors every broadcast minute on ABC, CBS and NBC TV networks. Rates are assigned each program and then applied to each commercial.

Spot TV: Arbitron's MediaWatch daily monitors spot TV on major stations in the top 75 markets.

Syndicated TV: Arbitron National Syndicated TV uses program rates supplied by advertisers and agencies. Satellite-distributed syndicated TV and Fox Broadcasting Co. are part of syndicated spending.

Cable TV networks: Arbitron's MediaWatch monitors six cable networks: CNN, ESPN, Family Channel, MTV:Music Television, WTBS and USA Network.

Network radio: Arbitron's MediaWatch monitors 14 radio networks broadcast by four companies.

Spot radio: LNA National Spot Radio collects data from 3,500 stations in more than 200 markets.

Unmeasured spending

Unmeasured spending is *Ad Age* estimates and include direct mail, promotion, co-op, couponing, catalogs, business and farm publications and special events, to name a few.

Brand spending

Ad spending by top brands presented in tabular form in each profile includes LNA/Arbitron's 10 measured media only.

Brand expenditures represent total spending by an LNA-designated "tradename" within a PIB subclass. For example, "Kraft cheeses" and "Kraft salad dressings & mayonnaise" are listed as top brands in the Philip Morris Cos. profile because they are in separate PIB subclasses.

Sales and earnings

Financial data are taken from public documents and correspond to the company's latest reporting period.

Division sales, which are worldwide, may exceed worldwide sales because of intersegment sales and/or "eliminations" not shown.

Market share

Unless otherwise noted, market shares reflect consecutive 12-month periods for comparison.

Personnel, brands, agencies

Each profile includes a list of top marketing and agency executives. The agency listed includes the point person on that account. Corporate addresses may include both mailing and street addresses. ☐